Tourism Opportunity Strategy
for the
Columbia Forest District

Prepared by

Future Legacy Consulting Group

Revelstoke and Salmon Arm, B.C.

March 31, 2001

Future Legacy Consulting Group
Planning today for tomorrow's legacy

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Preface

This report was prepared by **Roger Beardmore** and **Dave Kaegi** of *Future Legacy Consulting Group*, and **Steve Nicol** of *Lions Gate Consulting Inc*. Copies of the report, and the associated maps and database, are available from:

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The report is also available for viewing on the Ministry of Small Business, Tourism and Culture website **http://www.sbtc.gov.bc.ca/tos/tos.html**

The authors would like to gratefully acknowledge the assistance of **Debby Robinson**, who provided database support services for this project. **Graydon Rockwell III** of Nova Geomatics Ltd. did an excellent job of preparing digital and hardcopy maps for the project. We would also like to thank the members of the Advisory Committee, who gave many hours of their volunteer time to guide this project to fruition.

Lastly, but far from least, we want to thank the contributors – the people and tourism operators of Revelstoke and Golden - who provided a wealth of information about the recreational features and tourism activities of the Columbia District.

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1.0 Executive Summary

How to use this Study

This study is a compendium of resource materials providing government, communities, entrepreneurs and the public with information on a variety of ecotourism and adventure travel activities and opportunities in the Columbia Forest District. This report sorts through many of the issues facing outdoor adventure tourism in the study area, and makes some basic recommendations, at a broad, strategic level. It does not purport to be a detailed plan for community action, only a guidepost for future development.

The report is best used as a resource manual / atlas to access desired information quickly and succinctly without the need to read the entire report. For example:

- The general public, or those wishing to have a quick overview of the study results might wish to refer only to the Executive Summary.
- Business people may find the industry information provided in Section 3 or the specific activity information in Section 5 and Appendix 3 to be of most use.
- Government staff may wish to access the planning information provided in Section 4.
- Community economic development people and community leaders may be most interested in the community recommendations provided in Section 6.
- Those interested in business opportunities in the National Parks should refer to Appendix 5.

Purpose and Scope of the Study

The purpose of this study is to prepare a Tourism Opportunity Strategy (TOS) for the Columbia Forest District. The work is an extension of the Forest Recreation and Tourism Opportunity Studies (FRTOS) and Forest Tourism Opportunity Studies (FTOS) developed by the Ministry of Small Business, Tourism and Culture (MSBTC) over the past few years in support of community-based tourism development. This study will enable better operational management of tourism and recreation resources. In addition, it will support integrated resource and community planning targeted toward a future legacy of economic, social and environmental sustainability for district residents.

The study examines tourism trends and market opportunities as well as analyzes local resource assets and constraints to development. Key opportunities and development issues are identified for tourism product and activity development in the study area. Recommendations are provided for communities and entrepreneurs to consider in the development and promotion of the area's backcountry tourism opportunities. The information provided by this study provides a foundation for future government, community and business planning around economically, socially and environmentally sustainable tourism opportunities in the Columbia Forest District.

Project Management

The study was commissioned by the Ministry of Small Business, Tourism and Culture (Victoria) and the Contract manager was **Kevin Weaver**, Regional Manager, MSBTC, (Cranbrook). An Advisory Committee comprised of representatives from the communities of Golden and Revelstoke provided guidance. **Future Legacy Consulting Group** (Revelstoke and Salmon Arm) led the project, with assistance from **Lions Gate Consulting Inc.** (Vancouver). Technical mapping support was provided by **Nova Geomatics Ltd**. (Revelstoke).

Project Methodology

Preliminary Information Collection

Preliminary information was collected and a thorough review was conducted of background materials, reports, statistical information, feasibility assessments, business plans, maps, data (paper and digital), and other useful information from BC Government departments, ministries and agencies, and other pertinent sources. All existing digital data sets were imported and working base map was developed. In order to update the Tourism Resource Inventory (TRI), tourism operators and significant recreational user groups in the District were identified and sent a questionnaire based on previous TOS surveys. The survey was sent to 193 businesses, organizations and user groups. Surveys were sent to several offices of some government organizations and large businesses, so the list represents approximately 160 operators, agencies and user groups in the district. There were 41 respondents, giving a return rate of 26%. The TRI is a separate product from this report.

Selection of Tourism Activities

The Terms of Reference for the Tourism Opportunity Strategy called for the selection of ten (10) key tourism products / activities to be examined and studied in greater detail. Within the Columbia Forest District, a wide variety of recreation and tourism activities are occurring throughout the district. The study team used the results of a recently completed Revelstoke Area Recreation Inventory[1] on the west side of the district to develop a comprehensive list of potential activities that might be examined for new or enhanced tourism opportunities. The comprehensive list attempted to capture all of the varied and diverse recreational activities that were occurring within the western half of the district. Given the similarities of terrain, recreational use patterns and statistics throughout the entire Columbia Forest District, it was deemed appropriate to use this list as a starting point for the selection of recreational activities for the TOS process.

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[1] Revelstoke Area Recreation Inventory, Revelstoke Community Futures Corporation, July 2000.

In addition, the terms of reference for the TOS stated that the focus of the study would be on "…ecotourism, adventure travel and culturally based tourism development…." This helped to provide some initial direction as to which activities to consider. The comprehensive list of potential activities was presented to the project Advisory Committee (left hand side of the table below) and the committee members undertook a consensus selection process to determine which ten activities were to be examined. The committee selected the ten activities (on the right side of the table) below for detailed analysis and the identification of potential business opportunities.

LIST OF POTENTIAL ACTIVITIES		SELECTED ACTIVITIES
Alpine Skiing	Hunting	
ATV'ing	Mountain Biking	Canoeing / Kayaking
Berry / Mushroom Picking	Mountaineering	Cross-country skiing
Camping / Cabins	Nat. & Cult. Features Viewing	Fishing
Canoeing / Kayaking	Paragliding	Hiking
Cat-skiing	Power Boating	Mountain Biking
Caving	Rafting	Mountaineering
Cross-country skiing	Rock climbing	Rock climbing
Fishing	Rowing	Nat. & Cult. Features Viewing
Heli-hiking	Ski touring	Ski touring
Heli-skiing	Snowmobiling	Snowmobiling
Hiking	Touring (Auto)	
Horseback Riding		

Workshops

To assist in gathering information, workshops were held in Revelstoke and Golden in December 2000. A diverse range of business owners, guides, tour operators, economic and tourism agency representatives, and members of recreation user groups attended the workshops. The primary goal of each workshop was to *brain storm* with these knowledgeable persons to identify a number of potential *products* (tourism business opportunities) for each activity that have potential for development in the Columbia District.

Preliminary Research and SWOC Analysis of Tourism Opportunities

The study team undertook a detailed background contextual research and analysis on key issues affecting tourism development in the Columbia Forest District. This research included:

- International, national and provincial tourism market information.

- Provincial and regional tourism development strategies (especially trend analysis).
- Local tourism and other economic development strategies.
- Land and resource management planning and development activities in the Columbia Forest District and their impacts on tourism development.

A Strengths-Weaknesses-Opportunities-Challenges (SWOC) Analysis was conducted comprised of the following steps:

- Identification of the strengths of the region for development of particular tourism products.
- Identification of the weaknesses in the region for development of particular tourism products, indicating whether each weakness is correctable or intractable. Three main areas of weakness were explored: incompatibility with existing use; lack of community support; and lack of infrastructure (insufficient facilities).
- Identification of the opportunities in the region for development of particular tourism products. Rank the opportunities by filtering them through a matrix, plotting market attractiveness/growth potential on one dimension against competitiveness requirements on the other.
- Identification of the threats in the region for development of particular tourism products. Threats to resource-based tourism typically relate to management of the land and resources. Often the operator does not own the land, but rather has a license or lease to operate on it. The ownership and control of the land base in most cases rests with the provincial government (the Crown).
- Product Opportunity Analysis

The ten selected activities were analyzed to identify the best opportunity areas for the development of new or expanded ecotourism and adventure travel business opportunities. The analysis included consideration of:

- Conflicting recreational activities
- Conflicting recreation and tourism activities
- Resource extraction activities (logging, mining, hunting and trapping)
- Land use zoning
- Critical wildlife areas and sensitive environmental areas
- Transportation activities
- The potential of qualifying for a Commercial Recreation tenure per the criteria established by the B.C. Assets and Land Corporation on Crown Land, and
- Results of the SWOC analysis.

In addition, the knowledge and advice from extensive consultation with experts and operators for each product was incorporated into the opportunity analysis. The final product of the opportunity analysis is a series of "high opportunity" maps that show potential tourism product development opportunity areas, and an activity-by-activity analysis that clearly links commercial backcountry potential to the most suitable locations in the study area, as well as identifying market potential, infrastructure requirements, and issues that entrepreneurs will have to address in deciding whether to move forward with a development.

Activity Description and Analysis

This section describes the ten activities and provides a market analysis and resource analysis for each, as well as the identification of "high opportunity" areas for business expansion or new business creation in the Columbia District.

The market analysis first provides information on demographics related to the activity, and then describes psychograhic profiles (user characteristics) for each of the market segments that participate in this activity. A local assessment follows that ties broad market conditions to the local area. A resource analysis is provided that examines the physical parameters (terrain and infrastructure) required to maximize the potential for business development within each activity, and identifies the issues that need to be considered in pursuing business expansion or development.

Snowmobiling

Activity Description

This activity involves the use of snowmobiles to enjoy and explore trails and remote alpine backcountry areas. Snowmobiling occurs extensively throughout the study area in appropriate terrain. The season of use is Late October to early June, with the peak occurring between December and April.

Overall Potential

The large snowfall, the allure of high alpine "powder" snowmobiling areas and the remote and spectacular scenery are all significant advantages for the Columbia District. The overall potential for snowmobiling in the district is good, but commercial development will hinge on several key factors. First, more snowmobile participants have to be convinced to purchase either guiding services or lease equipment and gear. This can only be done by adding value and service to the snowmobiling experience. Second, there is a need to improve infrastructure and hospitality services to encourage longer and more frequent trips. And third, access to the best resources will be required. Land management and tenure policy will play big roles in this matter. From a commercial perspective, access to high quality alpine destinations is very important – access that is restricted or too distant will deter investment.

From a product perspective, new ideas that communities could explore to create snowmobile destinations include:

- The primary undeveloped opportunity is in the touring sector which could be encouraged with more backcountry infrastructure (e.g. hut development) and tour packaging. Integration into the provincial trail network advocated by the BCSF would also open up this sector.
- Snowmobile instruction and tours for specialty demographic markets including seniors and women.
- Product packaging potential with other activities such as lodges/resorts.
- Helicopter assisted snowmobiling (to the remote alpine).
- Snowmobiling events (e.g. BCSF sanctioned snowcross).

Selection of High Opportunity Areas

Within the Columbia Forest District, six areas have been determined to have the highest opportunity values for the activity of Snowmobiling resulting from the *Market Assessment* and *Resource Analysis*.

- North Dogtooth / Quartz Creek
- Blackwater Ridge /Marl Creek
- Mid / Upper Blaeberry River
- Boulder Mountain
- Frisby Ridge
- Keystone – Standard Basin

Ski Touring

Activity Description

Ski touring is a backcountry skiing activity that utilizes either specialized mountaineering or telemark ski equipment. Participants typically are physically fit, with at least intermediate to advanced skiing abilities, as this form of skiing is demanding. They undertake ski touring on a day-use or multi-day basis. With multi-day trips, participants stay in tents or snow-caves, or in backcountry cabins. Commercial operations are almost exclusively based from wilderness cabins. Most operators focus on "powder skiing" similar to the heli and cat skiing operators, although there is usually an added component of travel over variable scenic terrain as part of the experience. The significant difference is the exclusive reliance on self-propelled transportation. The tops of the runs are gained by attaching "skins" to the bottom of the skis and literally hiking on the snow. There is also a greater premium placed on pristine wilderness and lack of motorized vehicles.

Overall Potential

The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas.

Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

Selection of High Opportunity Areas

Within the Columbia Forest District, six areas have been determined to have the highest opportunity values for the activity of Ski Touring resulting from the *Market Assessment* and *Resource Analysis.*

- The Gold Range
- Mount Revelstoke National Park / Tangiers Valley
- Rogers Pass / Glacier National Park
- The Adamants Range
- The Esplanade Range
- Yoho National Park (Wapta Traverse, Lake O'Hara)

Cross-Country Skiing

Activity Description

Nordic Skiing, for the purposes of this study, involves the use of light nordic ski equipment and techniques on prepared (track-set) or groomed trails. It is typically a day use activity undertaken in scenic frontcountry areas in close proximity to an urban area or nearby resort. Equipment can be relatively inexpensive and requires only minor skill levels and fitness, although world-class athletes can and do participate in this sport. It is particularly well suited to families and people of all ages.

Overall Potential

The overall potential for this product is very good. By taking advantage of existing groomed trails and infrastructures development can be facilitated. While natural features such as varied terrain are important, the built environment is critical – that means things like night lighting, parking, clear signage, high-quality and well-maintained equipment, transportation services and the availability of multi-activity packages can really broader the appeal.

Potential may be especially good in situations where existing downhill ski markets can be targeted. Both Revelstoke and Golden could cater to destination-oriented skiers (e.g. family skiers and couples). Families with children value good instruction for both the children and adults, activity areas specifically for younger participants, good ski rental facilities in terms of equipment quality and size selection and dining facilities catering to families. Couples will value not only the facilities and trails for the ski activity itself, but the overall ambience of the area, including dining and accommodation.

Selection of High Opportunity Areas

Within the Columbia Forest District, three areas have been determined to have the highest opportunity values for the activity of Cross-Country Skiing resulting from the *Market Assessment* and *Resource Analysis*.

- Revelstoke Area
- Golden – West Bench
- Golden – Lower Blaeberry (Willowbank / North Bench)

Mountain Biking

Activity Description

This activity involves the use of mountain bikes for riding along secondary roads, gravel roads, trails and pathways. Mountain biking often takes riders over rough and technical terrain, sometimes at high speeds. Long distances are often covered, leading riders into remote areas. Mountain bikes have become highly engineered species of technology. There are now mountain bikes that are specially designed for cross country, down hill, and uphill riding. Like all activities that take place in the untamed outdoors, mountain biking can be hazardous. Typically, the skill level of a mountain bike rider is much greater than that of a recreational road rider.

Overall Potential

The potential is good for this product in the Columbia. Mountain biking and tour operators will need to collaborate with the local accommodation industry and other tourism providers to support their product. Packaging with other guided activities will extend the reach to soft adventurers. Developing commercial ventures in the study area will be a real challenge because it is often convenient to engage in unguided activities. With an extensive network of maps, guides and on-line resources, most visitors can gain a thorough understanding of biking options on the Internet. The key will be providing convenient support services (shuttling, rentals, repair, accommodation, meals, interpretation) to convert these participants to buyers of a value-added product.

Downhill ski areas could diversify to accommodate mountain biking during the summer season. A mix of purpose-built biking trails (gnarly trails with more obstacles) to attract extreme enthusiasts and family-oriented trails to encourage extended stays and spending in the area could be developed.

Selection of High Opportunity Areas

Within the Columbia Forest District, five areas have been determined to have the highest opportunity values for the activity of Mountain Biking resulting from the *Market Assessment* and *Resource Analysis*.

- Revelstoke Area (Mt. MacPherson – Mt. MacKenzie)
- Keystone / Standard Basin
- Golden – West Bench
- Mount Seven
- Blaeberry

Mountaineering

Activity Description

Mountaineering involves the ascent of mountains and peaks, and/or the traverse of mountainous terrain with the aid of technical climbing gear and specialized equipment. Due to its attendant hazards, mountaineering is normally only undertaken by experienced mountaineers or with the leadership and aid of an experienced guide. This can be undertaken as a day activity, but is often a multi-day excursion involving lengthy approaches and operating from remote base camps.

Overall Potential

Despite its ample alpine terrain, BC has not developed its full potential as a mountaineering destination and the Columbia District, while its natural resources may favour development, has modest potential because of its current lack of developed mountaineering products.

The association with the Canadian Rockies and the National and Provincial park system, and the fact that the area has long been associated with the "Canadian Alps" all enhance the marketability of the mountaineering product in the Columbia.

The hut product is closely associated with the development of multi-day products. Huts are the major alternative to camping and are a familiar accompaniment among European participants. The majority of the hut system in the Rockies is run by the Alpine Club of Canada (ACC) or by BC Parks. As most of these are let for a nominal charge, there is little inducement among the enthusiast contingent for guided services. Similar to other products assessed in this report, the best commercial potential is in increasing the appeal of this product to participants in the soft adventure market.

Mountaineering has been made more accessible through the use of helicopters, snowmobiles and glacier ski planes. Operators can appeal to the softer adventure market by using motorized transportation and superior accommodation facilities to offset trip durations and safety concerns. This is what heli-ski operators have done to create summer capacity for their facilities. In catering to the soft adventure participant and emphasizing the comforts of lodges and gourmet meals, clients are given the opportunity to "experience" the mountains and the thrill of summiting, without having to learn the hard, technical skills of mountaineering and climbing.

Selection of High Opportunity Areas

Within the Columbia Forest District, five areas have been determined to have the highest opportunity values for the activity of Mountaineering resulting from the *Market Assessment* and *Resource Analysis*.

- Rogers Pass – Glacier National Park
- Gold Range – Monashee Mountains
- Adamants Range – Selkirk Mountains
- Yoho National Park
- Mt. Clemenceau Area

Rockclimbing

Activity Description

Rockclimbing is the activity of climbing on steep rock walls, faces and bluffs using technical climbing gear such as ropes, harnesses, carabiners, camming units, etc. This is principally an outdoor activity, but increasingly, indoor climbing gyms are becoming popular where practitioners can learn or improve their skills in a controlled environment.

Overall Potential

While not exceptional, there is potential to expand the rock climbing product in the Columbia. Providing more teaching and instruction is one of the best ways to create more appeal for this product locally among participants and enthusiasts. A good model for development may be Yamnuska, Inc., a mountaineering school and guiding service based in Canmore, Alberta. They provide beginner to advanced courses in mountaineering, rock and ice climbing. More advanced courses are also available.

One sub-market that has expanded rapidly in the US and Canada is that of corporate climbing. Organizations such as Venture Up have built a sizeable commercial business catering to large corporations which use climbing for team building and experiential learning.

Selection of High Opportunity Areas

Within the Columbia Forest District, four small have been determined to have the highest opportunity values for the activity of Rockclimbing resulting from the *Market Assessment* and *Resource Analysis*.

- Lauretta Slabs
- Begbie Bluffs
- Shaketown
- Blanket Creek

Canoeing/kayaking

Activity Description

Canoeing and kayaking involve self-propelled (non-motorized) transportation around lakes and rivers, on a day-use basis, or multi-day trip. The skill level varies between novice for flat water paddling, to expert for maneuvering through technical white water rapids. It is suitable for a wide range of participants in both age and ability.

Overall Potential

The best potential is in the soft adventure/participant category for domestic, short-haul and German markets. All of these markets are seeking a broader outdoor adventure experience and will decide to participate in recreational paddling once in the region. The Columbia can offer a full range of close-in/remote adventures and is very well positioned to attract short-haul and German visitors, as the majority enters BC through the Alberta/BC border, primarily the TCH. Nature observation, wildlife viewing and fishing are also attractants for these markets. The German market, especially, is interested in wildlife viewing. Whether canoeing or kayaking, product development has to incorporate some outstanding recreational feature, aesthetic appeal or valued secondary activity. Multi-activity packaging and interpretation is essential.

The Columbia also has some outstanding rivers that offer higher grades of difficulty that appeal to enthusiasts and extreme sports, although most of the current commercial guiding is for rafting (e.g. Illecillewaet, Kicking Horse).

Selection of High Opportunity Areas

Within the Columbia Forest District, five areas have been determined to have the highest opportunity values for the activity of Snowmobiling resulting from the *Market Assessment* and *Resource Analysis.*

- Columbia River Reservoirs – (Upper Arrow Lake, Lake Revelstoke, Kinbasket)
- Goldstream River
- Columbia River (Golden – District Boundary)
- Kicking Horse River
- Lower Blaeberry River

Fishing

Activity Description

This activity includes fly-fishing and the use of spinning and casting gear from shore or from boats. Fishing occurs throughout the district on almost all bodies of water that are large enough to sustain harvestable quantities of fish. The reservoirs on the Columbia River (Upper Arrow Lake, Lake Revelstoke, and Kinbasket Lake) provide by far the greatest fishing opportunities as they are very large and are stocked regularly by the provincial government. A number of small alpine lakes and some creeks or rivers also provide good fishing opportunities, but cannot sustain large of fishers.

Overall Potential

The region is not well known among potential guided markets as a fishing destination; neighbouring areas have more variety, bigger fish and greater quantities of fish. However, the fishing resource is well suited for development as a secondary activity that could be targeted at the casual angler who is visiting for some other primary purpose. Therefore, the ability to provide visitors with alternative activity options is important. Experienced operators are now trying to diversify to protect themselves against declining participation and in the case of the coastal industry, further sport fishery restrictions. Many fishing lodges have broadened their products in the last few years and met with some success in catering to casual anglers (as opposed to sport fishermen).

In the Columbia, new development could focus on the growing percentage of juvenile anglers in the market, linking complementary products that have appeal for families and young people.

There may be some potential for expansion through the development of remote access, lodge-based fishing. This may or may not involve the use of helicopters (in which case the angling must be within a reasonable distance of the staging area to minimize transportation costs). The opportunity to link freshwater fishing with nature appreciation/ wildlife viewing and boating can be accomplished by increasing interpretation and awareness and creating multi-activity packages.

There is also further potential to expand fishing excursions on the region's reservoirs. Weather and safety conditions would have to be factored into development, but the lakes are well stocked and can provide access to numerous small creeks and streams where there is little fishing pressure.

Selection of High Opportunity Areas

Within the Columbia Forest District, four areas have been determined to have the highest opportunity values for the activity of Fishsing resulting from the *Market Assessment* and *Resource Analysis*.

- Upper Arrow Lake
- Lake Revelstoke
- Kinbasket Lake
- Susan and Blackwater Lakes

Hiking

Activity Description

The activity of Hiking involves the use of trails, generally to access alpine and sub-alpine destinations. It can either be on a day use or multi day use basis. Multi day backpacking is essentially an extended hiking trip where the participant must carry all personal gear, is required to camp-out, and is travelling in remote or semi-remote terrain for up to several days at a time.

Overall Potential

Development prospects in the Columbia area are positive because of high quality resources, excellent trail systems and visitor markets that place a high value on hiking activity. Among visitors to the Columbia, hiking/backpacking is the third most important activity with a participation rate of 14% among non-residents. The potential for commercial hiking tours spans a full range of options from multi-day trekking tours to short interpreted tours of the frontcountry.

While trail development and interpretation is important, the key to building a hiking product in the Columbia may be related to marketing and promotion that will get TCH travellers off the road, into the communities and onto its trails. Any curtailment of activity in the neighbouring national parks will create spill over for the surrounding Crown land base and, presumably, those operators and communities with the facilities and capacity to accommodate more visitation.

There are numerous aides for self-guided hiking in the region, including trail books, books, maps and web sites. The Canadian Rockies is one of the most exhaustively researched hiking areas in Canada and recreational organizations offer numerous resources to assist their members with access. Thus the benefits accrued through this activity will be primarily though unguided hiking.

Commercial operators must provide additional value to gain customers, either through a quality experience (not only the hike but interpretation, meals and lodging) and/or adding other desired activities, which the customers cannot do on their own.

Many hiking participants become repeat clients, so increasing the opportunity for new experiences should increase the potential for repeat customers. Communities in the study area have a range of hiking product that they can packaged with cultural, heritage and other nature-oriented activities. For example, further interpretation of unique features like the Columbia wetlands would significantly enhance the frontcountry hiking product in the Columbia Valley.

Backpacking and heli-hiking in more remote and high elevation locales could be augmented by hut development, which would allow for multi-day tours, and linkages with higher quality amenities (e.g. accommodation). This product would appeal to the hiking enthusiast market. There is a growing market, especially in the US, for wilderness camping.

Selection of High Opportunity Areas

Within the Columbia Forest District, six areas have been determined to have the highest opportunity values for the activity of Hiking resulting from the *Market Assessment* and *Resource Analysis*.

- Revelstoke Area
- Keystone / Standard Basin
- Rogers Pass – Glacier National Park
- Dogtooth Range
- Hospital Creek Complex
- Yoho National Park

Natural & Cultural Features Viewing

Activity Description

This activity involves the appreciation and enjoyment of an area's natural and/or cultural features. Typically, this occurs as part of another activity, but it may be the sole purpose of a person's trip. This activity may be undertaken as part of an auto, van, bicycle or bus tour, or be part of a backcountry trip involving hiking, canoeing or kayaking. Scenic flights are also a common method of providing a quick overview of spectacular natural features.

Overall Potential

The overall potential for the development of this product in the Columbia District is very good, primarily in the areas of historical interpretation, nature observation and bird watching. Historical theme development (railway, hydro in Revelstoke, railway, exploration in Golden) has already been undertaken in the communities but could be developed much further. Higher levels of interpretation and alternate programming will have to be undertaken to expand the appeal to already busy touring travellers. Survey data indicates that educational trips are a growing attractant for this group of travellers.[2]

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[2] Ecotourism – Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment Travel Trade Survey Results, HLA Consultants and The ARA Consulting Group, 1995.

Any development of this product could complement any other outdoor product. For a tourism operator, the ability to include glacier and alpine viewing, wildlife viewing, bird watching, railway interpretation and other related products into a multi-activity package makes for a more marketable trip experience. In the Columbia District, the opportunities for unique experiences are excellent.

Selection of High Opportunity Areas

The motivation for participation in this type of activity is the desire to see and learn about certain types of wildlife species, natural wonders and cultural/historical features. We are suggesting a number of high opportunity "viewing themes", and then identifying some of the best locations where these themes may be pursued.

- Bird watching
- Waterfall Viewing
- Wildflower Viewing
- Old Growth Forest Viewing
- Heritage Railway Tours
- Alpine History – Swiss Guides
- Fur Trade
- Transportation, Mining, and Settlement History

Community Tourism Development

The market and trend research suggests that tourism will continue to expand its economic profile in the Columbia, and, in time, comprise a greater share of the economic base than any other BC region outside of Vancouver/Whistler. The tourism industry and outdoor operators will develop more innovative products, match these to increasingly valuable niche markets and attract the financial and human capital necessary to drive development. Jobs and new sources of regional income will be created. In economic terms, the region will be more diversified and wealthier than it is today. But will it be a better region in which to live, socialize, raise a family, recreate and do business? What costs will communities be willing to bear for these ends?

We have closely reviewed the existing research and the results of our community consultation process in preparing the following discussion. The key community challenges are as follows:

- Building a sustainable tourism economy that conforms to overall community social, environmental and economic goals.
- Supporting this with a land use planning and resource management process that has a legitimate element of local input and control.
- Strategic use of community infrastructure and human resources.

- Industry and network development that maximizes local ownership and control of tourism businesses.

Tourism in the study area remains essentially a small business sector with a high degree of resident ownership and management, and as such, remains a valuable target for community development initiatives. Efforts to support and expand small business should be integrated with efforts to foster and attract businesses of all sizes that are compatible with community and tourism visions for development.

2.0 Introduction

2.1 Purpose

The purpose of this study is to prepare a Tourism Opportunity Strategy (TOS) for the Columbia Forest District. The work is an extension of the Forest Recreation and Tourism Opportunity Studies (FRTOS) and Forest Tourism Opportunity Studies (FTOS) developed by the Ministry of Small Business, Tourism and Culture (MSBTC) over the past few years in support of community-based tourism development. This study will enable better operational management of tourism and recreation resources. In addition, it will support integrated resource and community planning targeted toward a future legacy of economic, social and environmental sustainability for district residents.

2.2 Scope of the Study

The study examines tourism trends and market opportunities as well as analyzes local resource assets and constraints to development. Key opportunities and development issues are identified for tourism product and activity development in the study area. Development recommendations are provided for communities and entrepreneurs to consider in the development and promotion of the area's backcountry tourism opportunities. The information provided by this study provides a foundation for future government, community and business planning around economically, socially and environmentally sustainable tourism opportunities in the Columbia Forest District.

2.3 Project Methodology

2.3.1 Project Initiation

Upon notification of contract award, an initial meeting in Revelstoke was held with the contract manager for MSBTC, Mr. Kevin Weaver, to initiate the project. The purpose of the meeting was to:

- Verify the contractual and administrative aspects of the project, including refinement of the tasks, identification of priorities, scheduling, payment schedules, etc.
- Discuss strategies for completion of the project.
- Discuss roles and responsibilities of the Advisory Committee (AC).
- Discuss the list of key operators, agencies and user group representatives for participation on the AC.

- Transfer all available TRI, FRI and resource digital map layers as well as previous operator survey data from MSBTC to the consultant team
- Develop an initial sense of issues and constraints that may arise during the project.

2.3.2 Preliminary Information Collection

A thorough review of background materials, reports, statistical information, feasibility assessments, business plans, maps, data (paper and digital), and other useful information from BC Government departments, ministries and agencies, and other pertinent sources was completed. (Refer to **Appendix 6** – **Bibliography**).

2.3.3 Import Existing Digital Data

All existing data sets were imported, and a working base map was developed. Provincial Terrain Resource Information Mapping (TRIM) files make up the source for the base map. Existing tourism use (tourism resource inventory) and recreation use data (forest service sites, forest recreation inventory, recreation trails) from MSBTC and MoF were imported including all road, river, lake, and other features such as contours and protected areas (parks). The base map is complete, seamless and meets standard MELP projection parameters.

2.3.4 Operator / User Group Survey - Updating TRI database

In order to update the existing Tourism Resource Inventory (TRI), tourism operators and significant recreational user groups in the District were identified. A survey questionnaire based on previous TOS surveys was developed (refer to **Appendix 1** for a copy of the operator survey). The survey had two components: collection of existing information, and collection of information required for the strengths, weaknesses, opportunities, and threats (SWOT) analysis and community tourism development profiles. A base map accompanied each survey to capture spatial attribute data. The survey was sent to 193 businesses, organizations and user groups (refer to **Appendix 2** for a complete list of businesses and agencies the survey was sent to). Surveys were sent to several offices of some government organizations and large businesses, so the list represents approximately 160 operators, agencies and user groups in the district. There were 41 respondents, giving a return rate of 26%. Based on input from the surveys, we updated the TRI database for the Columbia Forest District. The TRI database is a separate product from this report.

2.3.5 Project Advisory Committee

A Project Advisory Committee was established to guide the study and provide an opportunity for community involvement in the TOS. This involvement is critical because stakeholders in the district are the best sources of information, community buy-in is essential to the success of the final product, and the community is the ultimate user of the final product.

The project Advisory Committee met on November 20 in Revelstoke to discuss overall direction for the study and to decide on the activities that would be the focus of the project. The Tourism Opportunity Strategy involves the selection of ten ecotourism/adventure travel activities. The intent is to review these ten activities at the district level, to determine ways to enhance existing tourism businesses, or identify new potential opportunities within the district.

The ten activities selected were:

Snowmobiling	Mountaineering
Ski Touring	Rockclimbing
Cross-country Skiing	Fishing
Mountain Biking	Hiking
Canoeing/Kayaking	Natural & Cultural Features Viewing

2.3.6 Workshops

To assist in gathering information, workshops were held in Revelstoke and Golden in December 2000. A diverse range of business owners, guides, tour operators, economic and tourism agency representatives, and members of recreation user groups attended the workshops. The primary goal of each workshop was to *brain storm* with theses knowledgeable persons to identify a number of potential *products* (tourism business opportunities) for each activity that have potential for development in the Columbia District (refer to **Appendix 3** for the **Workshop Results**).

Following the workshops and after discussions with several of the advisory committee members, stakeholders, and the consulting team, it became obvious that the focus of the project needed to be adjusted somewhat. While these adjustments were not dramatic, they reflect somewhat of a philosophical change. Two particular changes are noteworthy:

1) The emphasis on specific "product" identification and detailed inventory updating was reduced with greater emphasis being placed on market / resource / issue analysis related to the broader activities. Originally, the study was mandated to identify individual products such as guided tours, equipment rentals, etc., for more detailed research and opportunity analysis. Based on the feedback

received it was felt that additional research efforts would be better spent if focused on the broader activities themselves. Mapping products shifted away from raw tourism product "capability" mapping to broad "opportunity" mapping.

2) Recognizing that many tourism needs and resultant opportunities transcend any single activity, it was felt that it would be useful to look at some of the systemic issues that hinder existing operators let alone prevent development of new opportunities.

2.3.7 Preliminary Research and SWOC Analysis of Tourism Opportunities

The study team undertook a detailed background contextual research and analysis on key issues affecting tourism development in the Columbia Forest District. This research included:

- International, national and provincial tourism market information.
- Provincial and regional tourism development strategies (especially trend analysis).
- Local tourism and other economic development strategies.
- Land and resource management planning and development activities in the Columbia Forest District and their impacts on tourism development.

A Strengths-Weaknesses-Opportunities-Challenges (SWOC) Analysis was conducted comprised of the following steps:

- Identification of the strengths of the region for development of particular tourism products.
- Identification of the weaknesses in the region for development of particular tourism products, indicating whether each weakness is correctable or intractable. Three main areas of weakness were explored: incompatibility with existing use; lack of community support; and lack of infrastructure (insufficient facilities).
- Identification of the opportunities in the region for development of particular tourism products. Rank the opportunities by filtering them through a matrix, plotting market attractiveness/growth potential on one dimension against competitiveness requirements on the other.
- Identification of the threats in the region for development of particular tourism products. Threats to resource-based tourism typically relate to management of the land and resources. Often the operator does not own the land, but

rather has a license or lease to operate on it. The ownership and control of the land base in most cases rests with the provincial government (the Crown).

The results of the SWOC analysis are presented in **Section 5.1**.

2.3.8 Product Opportunity Analysis

The ten activities were analyzed to identify the best opportunity areas for the development of new or expanded ecotourism and adventure travel business opportunities. The analysis included consideration of:

- Conflicting recreational activities
- Conflicting recreation and tourism activities
- Resource extraction activities (logging, mining, hunting and trapping)
- Land use zoning
- Critical wildlife areas and sensitive environmental areas
- Transportation activities
- The potential of qualifying for a Commercial Recreation tenure per the criteria established by the B.C. Assets and Land Corporation on Crown Land, and
- Results of the SWOC analysis.

In addition, the knowledge and advice from extensive consultation with experts and operators for each product was incorporated into the opportunity analysis. The final product of the opportunity analysis is a series of "high opportunity" maps that show potential tourism product development opportunity areas, and an activity-by-activity analysis that clearly links commercial backcountry potential to the most suitable locations in the study area, as well as identifying market potential, infrastructure requirements, and issues that entrepreneurs will have to address in deciding whether to move forward with a development.
(See Section 5.3)

2.3.9 Community Tourism Development

The foregoing research and analysis was applied in the preparation of Community Tourism Development recommendations that focus on broad strategic initiatives, while providing detailed information that is important from a business development perspective. As well, infrastructure recommendations have been developed separately for both Golden and Revelstoke. This section includes the identification of systemic issues and suggestions about community or district-wide initiatives that could be undertaken to enhance the ability of all levels to take better advantage of the existing opportunities as well as new ones.

2.3.10 Community Open Houses

The draft report complete with maps was presented to the public at two open houses held in Golden and Revelstoke in mid-March. A total of twenty-five people attended these events.

2.3.11 Final Report

Comments were incorporated from the public review and Advisory Committee review, and the Tourism Opportunity Strategy report and contract deliverables were submitted to MSBTC on March 31, 2001.

2.3.12 Pre-feasibility Assessments and Best Practices

Pre-feasibility Assessments have been provided as a value-added product for this project. We believe local entrepreneurs and economic development practitioners will find the pre-feasibilities useful, informative and an impetus in moving tourism development into the implementation stage. One of the problems with tourism action plans, is they do not generally speak about the "on-the-ground" issues surrounding implementation. While opportunity identification is important, it will not, by itself, stimulate further development – the pre-feasibilities (together with an action plan) will hold up better as a development tool because they will provide the necessary micro-economic information that entrepreneurs are looking for. The pre-feasibility assessments are incorporated in the workshop results and are found in **Appendix 3** in this report.

An additional valued-added product we have provided is a series of case studies of **Best Practices** that help to illustrate business opportunities and recommendations. The Best Practices are included in **Chapter 6** of the report.

3.0 Regional Tourism Profile

3.1 The Study Area – Columbia Forest District

The Columbia Forest District covers three major physiographic areas; the Rocky Mountains, the Rocky Mountain Trench and the Columbia Mountains.

Error! Unknown switch argument.

The Rocky Mountains, to the east of Kinbasket Lake and the Columbia River south of Kinbasket Lake are world renowned for their scenery, heights and relief. Their "matterhorn" peaks are the result of cirque glaciation, while valley outlines have been modified by both ice and water erosion.

The Columbia Mountains, consisting of the Purcell, Selkirk and Monashee Mountains are to the west of the Rocky Mountains. They are older than the Rocky Mountains and extremely rugged, having been sculpted like the Rocky Mountains, by cirque and valley glaciation. Dividing the Columbia and Rocky Mountains is the Rocky Mountain Trench, a wide valley extending in a northwesterly direction from the B.C. - U.S.A. border to the B.C. - Yukon border.

The Columbia River flows north in the Rocky Mountain Trench, then south between the Selkirk and Monashee Mountains. Three large reservoirs on the Columbia River provide for much of the low elevation water based recreational activity.
This area is in the Interior Wet Belt and receives precipitation second only to that of the west coast. The climate is continental with cool winters and warm summers. The valley bottom temperatures are moderate from May to September, and warmest in July and August. The alpine meadows and subalpine forests are snow free from mid-July to mid-October, but adverse weather may be expected year round.

The recreational opportunities are consistent with the rugged nature of the terrain. In summer, camping, fishing and picnicking are pursued along the watercourses and lakes at lower elevations, while at higher elevations heli-hiking, hiking and mountaineering are pursued. Hiking and hunting are popular in the fall, giving way to heli and cat skiing, cross-country skiing, ski touring, alpine skiing at resorts and snowmobiling as the snowpack increases. Wildlife viewing and visiting hotsprings occurs throughout the year. The presence of four National Parks within this district offers unique opportunities as well as distinct challenges to the development of ecotourism and adventure travel within the study area.

Access to the area from the east and west is by Highway 1, from the south, Highway 95 provides access to Golden and Highway 23 provides access to Revelstoke. The relative isolation of these communities as well as historic oscillations in their largely resource-based economies has contributed to significant community interest and involvement in how forest resources and other values are managed.

3.2 Industry Structure

3.2.1 Revelstoke

There are currently 87 tourism-related businesses in ***Revelstoke***, including 38 hotels/motels/B&B's, 15 campgrounds, 7 backcountry huts/lodges, an 18-hole golf course, and alpine ski resort, and 18 tour operators. There are more than 40 food service establishments, although many of these cater to local customers rather than tourists. There are several facilities offering small convention space, although most are public buildings. Revelstoke has four different museums close to the downtown and another eight tourist attractions oriented to highway visitors. The two national, five provincial and two municipal parks in the area are significant components of the tourism product mix. They draw visitors and provide a host of opportunities for outdoor recreation. The community is a handy base for guided and self-guided activities because of its central location and its day-trip distance to national and provincial parks.

In terms of backcountry tourism, the area offers visitors a good mix of summer and winter activity options ranging from heli-skiing and heli-hiking, cat skiing, hiking and hunting to rock climbing. The quality of the resources that support some of these activities attracts visitors from both the short and long haul markets. Many of the tourism businesses for the major products (heli-skiing, heli-hiking, cat-skiing, snowmobile tours), are well established with national and international clientele.

There are approximately 15-20 operators based in Revelstoke offering soft and hard adventure activities. These include helicopter companies, snowmobile rental/tour operators, horseback outfits, river-rafting companies, fishing tour operators, heli-ski and cat-ski operators and bike rental/tour companies. There are additional; tour operators operating out of Revelstoke, some of which are not formally recognized with commercial recreation tenures.

3.2.2 Golden

There are 74 tourism-related businesses located within the ***Golden & District*** area. Types of businesses include accommodation (38), campgrounds (6), backcountry huts /lodges (7) and tour operators (16). In addition to these area-based tourism businesses, non-resident tourism businesses mostly from the Banff / Lake Louise area operate seasonally within the area. Estimates range from 10 to 20, but the number could be higher. Like Revelstoke, Golden is in close proximity to several parks, in this case, five major National Parks. These parks represent an internationally significant tourist drawing card that has yet to be fully promoted by the community.

The 16 tour operators based in the Golden area offer a variety of backcountry tourism products and activities, including fishing, canoeing, white water rafting, cycling, hiking, skiing, heli-hiking and heli-skiing, and bird watching. There are additional tour operators operating out of Golden, some of which are not formally recognized with commercial recreation tenures. As with Revelstoke, the community is a handy base for guided and self-guided activities because of its central location and its day-trip distance to national parks. Golden provides one of the best bases in the province for the hut-to-hut experience, summer or winter. Hut-to-hut hiking and ski touring has seen some development in the last decade. The area has also developed a bit of a destination status for cycle touring (Golden Triangle) and hang-gliding (Mt. Seven) in recent years. Golden also has a ski resort (Kicking Horse Resort) that is quickly gaining a national and international reputation as a skiing destination, and a golf course which is recognized as one of the best courses in the province.

3.3 Current Visitor and Statistical Data

3.3.1 Overview of Visitor Characteristics

According to the 1997 BC Visitors Study[1], the East and West Rockies regions (a small part of which is the study area) accounted for 12% and 8%, respectively, of the 30.6 million visitors to BC in 1996. The share of non-resident visitor volumes is relatively high because of the regions' position as the entry point for west bound Trans Canada Highway from Alberta. In contrast to non-resident visitation, the share of resident visitation is among the lowest of any region in the province. The preponderance of pass-through highway traffic means lower trip spending and shorter trip lengths and this translates into a share of total spending of approximately 4% to 5%.

The average party size was around 2.2 people for non-residents and 2.7 for residents, with significant percentages of solo travellers. Families with children represented less than 20% of all travel parties. The average age of out-of-province visitors was about 49 years, slightly older than the average age of BC visitors, which was 47 years. Overseas visitors tended to younger on average, while North American visitors were older (one third were retired).

Summary Visitor Data

	East Rockies			West Rockies		
	Non-resident	Resident	Total	Non-resident	Resident	Total

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[1] British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

Total number of visitors (thousands)	3,049	549	3,598	1,563	929	2,492
Percent of BC	26%	3%	12%	13%	5%	8%
Total amount of expenditures (millions)	$344	$57	$401	$184	$121	$305
Percent of BC	6%	2%	5%	3%	4%	4%
Ave length of stay	3.6	2.4	3.4	2.9	2.8	2.9
Ave Per Person Per Day Expenditure ($)	$32	$47	$34	$40	$51	$46
Ave Per Person Per Stay Expenditure ($)	$113	$105	$112	$118	$130	$127

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.2 Visitor Origin

The Columbia region caters to a geographic mix of visitors, predominantly from close-in markets. Approximately 75% of non-resident visitors were from regional markets in Canada (Alberta and Saskatchewan) and the US (Washington, Oregon, Idaho). Long-haul markets are also important, accounting for another 14% of visitors.

Visitor Origin

	Overnight Visitors %	
	East Rockies	**West Rockies**
Non-resident Visitor Origin		
Regional Canada	68	59
Regional US	5	17
Long Haul Canada	7	6
Long Haul US	7	7
Asia/Pacific	5	3
Europe	7	8
Other Overseas	1	1
BC Resident Visitor Origin		
Lower Mainland	32	34
Vancouver Island	3	9
North	1	2
South	64	55

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.3 Trip Purpose and Activities

The primary trip purpose for nine out of ten visitors was leisure, with the other roughly 10% travelling on business. Among non-residents, the most popular activities were sightseeing, swimming and hiking/backpacking. Approximately four percent of visitors to the West Rockies were primarily interested in a backcountry wilderness experience, versus only one percent in the East Rockies. When the various outdoor adventure activities are combined, they cover approximately one quarter of all visitors.

Primary Trip Purpose and Activities

	East Rockies		West Rockies	
	Non-resident Total %	BC Resident Total %	Non-resident Total %	BC Resident Total %
Primary Trip Purpose				
Leisure Visitors	91	91	91	92
Business Visitors	9	9	9	8
Main Activities				
Sightseeing	27		25	
Swimming	20		15	
Hiking/backpacking	19		14	
Golfing	19		12	
Visiting friends and relatives	10		11	
Resting/relaxing	10		7	
Downhill skiing	4		7	
Zoos/gardens/natural displays	4		6	
Art galleries/museums	3		5	
Exploring backcountry wilderness	1		4	
Sporting events	1		4	

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.4 Transportation

Almost nine in ten visitors to the region used motor vehicles (car/truck/van/motorcycle) to travel within the province. Camper/RV travel was also popular, but more so for non-residents than residents.

Travel Characteristics

	East Rockies		West Rockies	
	Non-resident Total %	BC Resident %	Non-resident Total %	BC Resident %
Mode of Transportation in BC				
Car/small truck/van/motorcycle	85	89	87	88
Ferry with car	1	7	16	14
Plane	5	2	1	6
Camper/RV	20	8	14	8

Motorcoach/bus	5	3	3	2
Taxi/limo	-	1	1	2
City transit	3	*	9	2
Personal boat	-	-	-	2
Cruise ship/charter or rental boat	-	-	-	1
Ferry without car	2	-	2	-
Train	1	-	2	-
Other	-	-	-	3

* Less than 1%.

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.5 Trip Experience

The 1997 BC Visitor Study indicated that travellers to BC who entered either the East Rockies or West Rockies tourism regions during their visit were very satisfied with their trip experience. Outdoor activities rated very highly, and the farther they travelled to BC the more satisfied visitors were. Not surprisingly, viewing scenic areas and especially mountain areas was mentioned as being very important in their decision to travel to BC in the first place. Almost nine in ten of these visitors were impressed with BC's spectacular natural beauty in the scenic and mountain areas they observed during their trips.

3.3.6 Room Revenues

Tourism in the study area (as measured by statistics for the Columbia-Shuswap Regional District) has been growing over the last five years, although performance lags provincial and Vancouver Island growth rates. Revenue growth in the CSRD has been spread across all revenue categories, with the best performance in vacation rentals and the poorest in fishing lodges. During the same 1995 to 1999 period, the Thompson Okanagan and BC both experienced growth across all revenue categories, with rapid growth in hotels and vacation rentals.

Regional Room Revenues

	1995	1996	1997	1998	1999		
	Revenue ($,000)	**Revenue** ($,000)	**Revenue** ($,000)	**Revenue** ($,000)	**Revenue** ($,000)	**Properties**	**Rooms**
BC Totals	999,453	1,093,487	1,157,582	1,206,097	1,328,932	2,293	81,982

Thompson-Okanagan Totals	137,712	139,958	146,520	155,799	166,895	597	18,042
Columbia-Shuswap	24,928	26,327	26,811	27,681	28,933	118	3,015
Fishing Lodges	137	137	189	129	146	7	54
Hotels	10,516	11,466	11,254	11,764	12,489	21	1,049
Motels	10,559	10,290	10,763	10,952	11,268	54	1,429
Vacation Rentals	1,315	1,581	1,701	1,943	1,985	14	195
Miscellaneous	2,400	2,853	2,905	2,893	3,044	22	288

Source: BC Stats

3.3.7 Traffic Volume Trends

The highway system is a critical transportation service for the region and represents the lifeblood of much of its economic activity. The Trans Canada Highway (Highway #1) handles most of the visitor traffic east and west across the region. The following table provides average summer daily traffic (SADT) for four count stations, all on Highway #1. There have not been significant population fluctuations during this time in either Revelstoke or Golden, so it is reasonable to conclude that a good portion of activity change can be attributable to visitors. All count stations have seen a very modest growth in summer traffic, ranging from 0.8% to 1.5% since 1991. However, highway traffic appears to have peaked in 1995 after strong growth in the early 90s.

Summer Average Daily Traffic (SADT), Trans Canada Highway, 1991-1999

	1991	1992	1993	1994	1995	1996	1997	1998	1999	Avg. Yr. Growth
At west end of Columbia River Bridge, west of Revelstoke	10,500	10,700	12,300	12,400	12,961	n/a	n/a	12,156	11,982	1.5%
4 km east of Rte 23, east of Revelstoke	8,000	8,300	9,100	8,800	8,899	n/a	n/a	8,521	8,560	0.8%
3.2 km west of Rte 95, west of Golden	8,500	8,900	9,700	10,000	10,711	n/a	n/a	9,461	9,546	1.3%
2.5 km east of Rte 95, Golden	7,412	7,453	8,025	8,407	9,175	8,353	7,997	8,484	8,434	1.4%

Source: Ministry of Transportation and Highways

3.4 Key Market Trends and Indicators

The tourism industry within British Columbia is a vital and vibrant component of the British Columbia economy. The following trends are meant to illustrate the opportunities in tourism, particularly the outdoor adventure/ecotourism component, and highlight the need for effective tourism planning throughout the province[2].

Visitor Volumes – The volume of visitors to the province continues to increase. In 1999, British Columbia hosted 22.3 million overnight visitors an increase of 2.1% from 1998. Nearly half (48%) of these visitors were British Columbia residents. Travellers from other parts of Canada accounted for 4.8 million visits (21.7%) a 1.7% increase over the previous year. Visitation from the US, Asia/Pacific and Europe have all been increasing in recent years.

Expenditures - Tourism revenue totalled $9.2 billion in 1999, a 4.9% increase over 1998. Positive revenue growth in 1999 was attributable to US, British Columbia, Canadian and European markets. Visitor spending among key markets varied with the length of stay and per day expenditures. British Columbia residents represent half of total visitor volume last year but only one quarter of the revenue whereas overseas visitors contributed 18% of the total revenue while representing only 7% of the volume.

Employment - In 1998, 112,940 people were directly employed in British Columbia's tourism industry, ranking it fifth in provincial employment and ahead of all of the goods-producing (resource-based) sectors. Tourism employment in British Columbia accounts for approximately 1-in-12 jobs in the province. Growth in tourism employment rose 31% in the ten-year period from 1989 to 1998, approaching nearly double the provincial average of 19%.

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[2] Statistics in this section are sourced from the Research Services Branch of Tourism British Columbia.

Tourism and Rural Job Creation - Clearly, tourism is a prime growth engine for rural British Columbia because it can create new and relatively stable long-term jobs for local residents[3]. This is significant considering that most North American tourism destinations have enjoyed stable or expanding markets for several decades, at a time when primary resource industries have experienced cyclical, and too often permanent, downturns in jobs. Tourism jobs are readily accessible to local residents, as they often require a familiarity with the region. Tourism is particularly important as a generator of youth, entry-level jobs.

Tourism and Regional Economic Development - Tourism is important to the economic diversification and health of many rural BC communities. Tourism is the only industry with a positive net flow of funds from wealthier to poorer regions, and from urban to rural communities. Because of the nature of the tourism sector, the majority of the money spent is imported from other geographic regions, and is new to the host community. As a result studies show that tourism revenue can result in a five to seven times multiplier effect in local communities[4].

Ecotourism/Adventure Tourism - Ecotourism is that component of the tourism industry that focuses on the experiencing of natural or indigenous culture in a way that minimizes impacts. Ecotourism appeals to a global market, particularly well educated, affluent, urban residents from developed countries. BC's high quality and diverse natural scenery offer the competitive conditions for the province's expanding eco-adventure tourism sector. Tourism BC estimates the value of ecotourism and adventure tourism to be in excess of $900 million annually[5]. Significant as this is, as important is the fact that BC rates as a top adventure tourism destination in North America[6]. Ecotourism is the fastest growing segment of the BC tourism sector. Furthermore, the opportunities for expansion of BC's ecotourism sector are substantial. This is important given that one-half of U.S. adults – or 98 million persons – took an adventure vacation within the past five years. A recent national survey of the ecotourism and adventure tourism sector in Canada concluded that "Canada's natural environment, encompassing vast unspoiled wilderness areas and spectacular scenery is ideally suited to the development of adventure travel and ecotourism and is already the basis of an internationally competitive product base."[7]

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[3] Cited in: Jobs and Environment — Moving British Columbia into the 21st Century, BC Ministry of Environment, Lands and Parks, 1999.

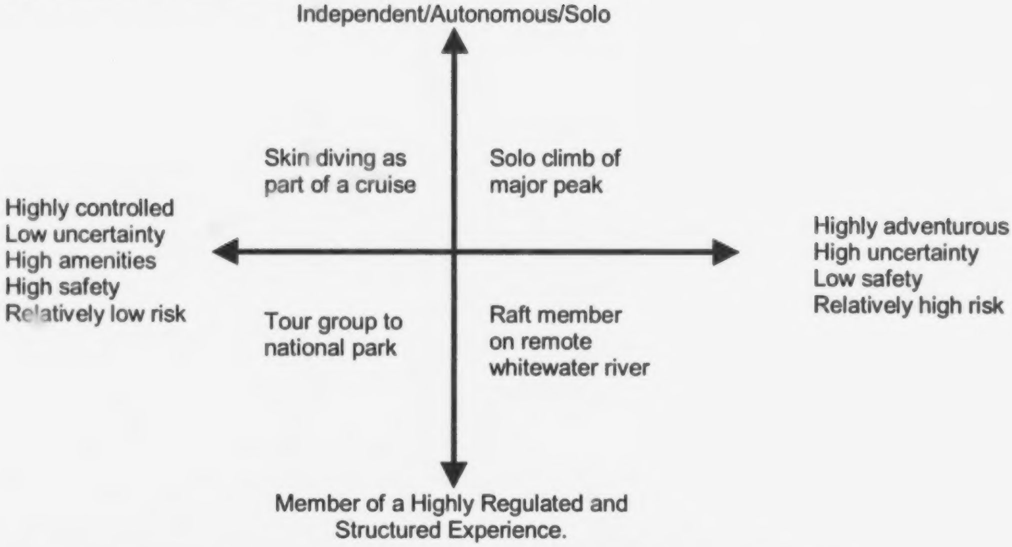
[4] Shoaf, W. "Sundance". Article for Business Coalition for Sustainable Cities, at http//www.earthpledge.org/progress/wpapers/wpsundan.html.

[5] Tourism BC.

[6] Travel Industry Association of America. January 1998. The Adventure Travel Report, 1997.

[7] The Randolph Group. January ,1997. Adventure Travel and Ecotourism in Canada: Strategic Framework for Development. A report prepared for the Canadian Tourism Commission.

The Adventure Tourism Experience


Independent/Autonomous/Solo
Skin diving as part of a cruise
Solo climb of major peak
Highly controlled
Low uncertainty
High amenities
High safety
Relatively low risk
Highly adventurous
High uncertainty
Low safety
Relatively high risk
Tour group to national park
Raft member on remote whitewater river
Member of a Highly Regulated and Structured Experience.

Trends in Outdoor Recreation: Programs, Experiences and Issues, Alan W. Ewert, Indiana University, 2000

The Adventure/Ecotourism Experience – The outdoor adventure/ecotourism market is expanding, but it is also changing, placing greater value on flexible packaging, well qualified hosting and guiding, learning and interpretive experiences, and sustainability practices. The outdoor adventure experience encompasses four major characteristics: (a) involvement with a natural environment, (b) elements of risk and danger, (c) uncertain outcome, and (d) influenced by the participant or circumstance. These components serve to separate adventure recreation from other forms of recreational activities. The adventure experience can also vary along a number of dimensions including type of travel, group membership, and/or amount and spectrum of risk. This variance is illustrated in the preceding figure. The adventure travel industry uses potential risk as a parameter in categorizing adventure activities into hard or soft activities. Most operators are now familiar with this terminology but have to be increasingly aware of further fracturing and the implications this will have for both product and market development.

Access and Opportunities – Access and opportunity is paramount to adventure recreation and since the bulk of the land base is Crown land, these are usually determined by provincial land managers. Allowable activities, acceptable practices and facilities are the three main parameters determining what activity occurs and where. Adventure activities are increasingly seen as a legitimate use of Crown lands but it has only been in the very recent past that multiple-use concepts have even been mentioned in the policy framework. The industry, and communities which rely on the related economic benefits, have to ensure that adventure tourism interests have a rightful place within the land and resource management regime.

Technology – In general, technological innovations, whether equipment or clothing-oriented, impact the adventure recreation experience in five ways: access/transportation, comfort, safety, communication, and information. This has enabled lesser skilled participants to participate in activities at the more extreme end of the spectrum. In the end, this will continue to increase participation and open up new opportunities for business and market development.

Societal Acceptance – A number of emerging trends suggest that outdoor adventure recreation is becoming much more accepted by the public than has previously been the case. Coverage by the mass media, the growth of adventure programs for therapeutic intent and the growth of training programs that incorporate adventure activities are some examples of how pervasive outdoor activities have become. This will not only increase participation, demand and business opportunities, but place tremendous pressure on land managers to actively manage for tourism values when this has not occurred in the past.

Implications for Tourism Development in the Columbia District – Future tourism growth in Canada and British Columbia will be driven by interest in outdoor experiences, particularly those in the soft adventure market and ecotourism. The Columbia region has many of the attributes needed to appeal to these markets but development will depend on key responses. Operators should provide the features and amenities that have the strongest appeal for local travel markets, which tend to be in the soft adventure category. Incorporation of technology and innovation will help communities to broaden market appeal for activities in demand, and improve their own competitiveness. They must seek greater cooperation with land managers and communities to ensure the Crown land base recognizes the demands and needs of tourism as a legitimate resource user. Communities can play a more prominent role by furnishing infrastructure and support services that underpin the industry and the employment and regional income benefits it can bring to local residents.

4.0 The Planning Context

4.1 Tourism Planning in the Study Area

There are a variety of reports and studies that have been prepared in recent years for areas within the Columbia Forest District. (Please refer to the Bibliography in Appendix 6 for a listing of these reports). This section highlights some of the planning studies that are most relevant to the TOS process.

4.1.1 Golden & Dist. Strategic Tourism Marketing & Development Plan 1996-2001

This plan identified a five-year strategy to undertake a number of major tourism marketing and product development initiatives that Golden & District should undertake which would establish it as an outdoor tourism destination within the Rocky Mountain Region and benefit the tourism sector and community.

4.1.2 Golden Community Impact Analysis

The Golden area is undergoing substantial changes stimulated by approximately $200 million in new investments in the Tourism/Recreation/Hospitality Sector. The construction of a four- season resort by Kicking Horse Mountain Resorts is the major initiative driving current levels of growth. This project, along with a fair number of related investments, is expected to generate a considerable increase in pressure on community infrastructure—including social and economic services. The implications of these new pressures are in the process of being measured and assessed in order to allow Golden's local service delivery agencies and municipal government to plan and prepare for the impacts of these anticipated changes.

4.1.3 Gateways Initiative

The Ministry of Small Business, Tourism and Culture has recently selected Golden for the Park and Backcountry Gateways Program[1]. The program aims to build a strong competitive position in the ecotourism and adventure travel sectors by helping communities develop park and backcountry gateways around the

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[1] The goal of the Park and Backcountry Gateways program is "to develop public and commercial recreation opportunities for local communities, while promoting a strong commitment to support the protection of natural values and work within the ecological and conservation mandates of parks."

Crown land base. The primary role of gateway communities is to develop public and commercial recreation opportunities for local communities, while promoting a strong commitment to support the protection of natural values and work within the ecological and conservation mandates of parks. A tourism coordinator has been hired to work with the Golden Economic Development Commission and some preliminary project identification has occurred. A business plan is being prepared at time of writing with implementation to follow through to the end of 2001.

4.1.4 Revelstoke Tourism Development Strategy (1997)

Revelstoke's economic development strategy (1995) stated that tourism should be a growth sector in Revelstoke over the life of the new economic development strategy. It further recommended that the preparation of a tourism development strategy should be a high priority for Revelstoke. This was completed in 1997 and resulted in the identification of a wide range of possible tourism development, market, and marketing opportunities for Revelstoke.

4.2 Land Use and Resource Planning

4.2.1 Kootenay Boundary Land Use Plan

The KBLUP sets out broad regional management objectives and strategies as well as geographically specific land and resource management objectives in each Resource Management Zone in each forest district. Some of the statements in this document were formally adopted by the provincial government and now are legally binging as a *higher level plan*. Other statements, such as those relating to recreation and tourism were not formally adopted and therefore provide only guidance. Within the KBLUP, recreation objectives are usually rather vague and most commonly call for "a range of recreation opportunities towards the semi-primitive end of the recreation opportunity spectrum" in most zones. Occasionally, a modifier such as "maintain a range of recreational opportunities from roaded resource land to semi-primitive non-motorized" is included.

Infrequently, mention is made of specific resources such as "maintain the integrity of the Howse Pass Heritage Trail".

One incidence of support for commercial tourism is made in the West bench Area. The objective is to "Maintain and enhance opportunities for resorts and commercial backcountry recreation". The associated strategy says "Provide Crown Land as necessary for expansion of the West bench Recreation Area…subject to consideration of conservation values, municipal and regional planning, and the provincial land use charter and goals".

4.2.2 Golden Recreation and Access Zoning Plan

In Golden, the Recreation and access zoning planning process is attempting to create a zoning and access plan that will determine where certain recreation activities can and cannot occur. The process is based upon the nature and scope of current and potential recreation use, environmental and habitat considerations, industrial activity, and people's vision of how certain parts of the land should be managed for these values. The goal is to develop a pro-active decision making process that will consider both zoning and access requirements that are needed to promote tourism, maintain local recreation opportunities, and preserve important wildlife habitat for the future. The outcomes of this work (though still in progress) will be considered in the evaluation and identification of tourism opportunities in this project.

4.2.3 Revelstoke Minister's Advisory Committee

The recommendations of the Kootenay Boundary Land Use Plan (1994) precipitated deep concerns by many citizens of Revelstoke and the community reacted by demanding the opportunity to develop its own recommendations for utilization of the land base. The Minister's Advisory Committee (RMAC) was struck and over the next several years developed a report that would "…provide the Ministry of Forests with advice on land-use issues." The Advisory Committee's task, working from the direction provided by the Negotiating Committee, was to develop recommendations regarding the implementation of the land use plan that, as much as possible, balance the economic, environmental and social needs of the community and the province. The committee's report was submitted to the Ministry of Forests in October 1999. The RMAC has yet to be formally approved by the provincial government or formally endorsed by the tourism sector.

The timber industry and tourism are corner posts of the local economy, and their future depends largely on the management of the natural resources in the area. In recent years outdoor adventure tourism and highway-related travel has increased substantially as Revelstoke has been identified internationally as one of the best locations for winter adventure sports and other activities. This has increased the importance of highway viewscapes, and created the potential for conflicts with environmental values.

The MAC report has many recommendations covering a wide array of issues including biodiversity, wildlife values (including Mountain Caribou and Grizzlies), forestry, tourism and mining. The following recommendations were developed concerning tourism):

Class 1 viewscape assignment to Trans Canada corridor and Revelstoke viewscapes. To reflect tourism values along Highway 23S, increased emphasis has been placed on visual landscape design and rehabilitation within Class 3 viewscape assignment. Regional strategy assigns Class 2 management for Highway 23S.	Viewscapes should be improved through rehabilitation of existing industrial openings, and landscape design of future openings.
Aggregated harvesting openings will result in larger cut blocks in some areas.	Reduced green-up requirements and aggregated harvesting openings may make logging more evident in the backcountry. This should be partially mitigated by provisions for improved design to better integrate openings into the landscape.
Provisions for commercial tenure holders to formally articulate their needs when forest management and mining planning approvals are being considered.	Plan clarifies and formalizes management of tourism related resources.

(MAC Report, pg. Viii)

4.2.4 An Ecotourism and Adventure Travel Strategy for British Columbia

Ecotourism and adventure travel is one of the fastest growing sectors of BC's tourism industry. An expanding market of knowledgeable travellers is looking for spectacular settings and challenging activities. This strategy lays out a role for the Ministry of Small Business, Tourism and Culture, and the provincial Government generally, in fostering growth in this sector while ensuring benefit to communities and resources that the industry depends on. Canada still accounts for only a fraction of the North American ecotourism and adventure travel market. Despite the recent growth in British Columbia, there is considerable room for growth of the industry.

Entrepreneurs and communities play a leading role in expanding the ecotourism and adventure travel industry. Government, however, has a unique and important role in fostering this growth. This role includes: strategic investments to create new opportunities; promotion of high standards of quality practice; and establishment of regulatory and tax regimes that maintain the vigour of the industry.

This strategy outlines a role for the Government of BC (or SBTC) in supporting growth in BC's ecotourism and adventure travel industry, while ensuring the protection of resources and host communities. The strategy follows three major themes:

Work with Communities to create new opportunities: Host communities should be the primary beneficiaries of growth in ecotourism and adventure travel.

Communities across British Columbia act as the gateway to parks and backcountry areas. They form the base of operations and supply for businesses; they are the home of people who work in the industry. The Province can create new ecotourism opportunities by working with communities to systematically identify their particular strengths, weaknesses and opportunities and by developing programs that meet the particular needs of communities. The Province can also work with communities to develop recreation infrastructure, such as trails, that supports ecotourism and adventure travel.

Work with Industry to promote product quality and best practices: Because it comprises many small operators spread across the province, the ecotourism industry is vulnerable to uneven business skills, lack of industry standards, and underdeveloped networks for marketing and product packaging. By working with sector or industry groups the Province can develop and promote high standards of quality. To ensure the continued viability of the ecotourism industry, particular attention should be paid to practices and technologies that minimize environmental damage.

Within Government, streamline regulation, improve access to land and resources: Most ecotourism operators face a range of regulations, fees and taxes. The tourism industry has called for more effort on streamlining and coordination to create a fair and supportive environment for ecotourism businesses. Ecotourism businesses depend on access to Crown land. The Commercial Recreation (CR) policy is the primary tool for managing and regulating this access. The policy was recently revised to improve business access to Crown land. Effective delivery of this policy will require a new sensitivity to industry needs. In some cases, local planning, and coordination with other resource uses will also be necessary.[2]

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[2] Excerpted from: Draft Ecotourism and Adventure Travel Strategy for British Columbia, Stephen Connolly, Ministry of Small Business, Tourism and Culture, Victoria, 2000.

5.0 Tourism Opportunities in the Columbia District

5.1 SWOC Analysis for Revelstoke & Golden

The strengths, weakness, opportunities, and challenges (SWOC) was developed by analyzing many of the documents previously discussed in this report, or listed in the bibliography. The intention of this section is to give a brief overview of a SWOC for each community. It is not intended to be an in-depth analysis. In depth SWOC analyses have recently been done elsewhere for each community (Revelstoke tourism Development Strategy, Golden & District Strategic tourism marketing and Development Plan). The draft SWOC analysis of this report was reviewed by the Advisory Committee and recommended changes incorporated.

5.1.1 Revelstoke

Revelstoke has the natural resources to support a full range of four-season outdoor recreation products. Its snow conditions, and the opportunities they afford for cross-country skiing, ski touring, heli-skiing and snowmobiling, have the potential for expanding the tourism season more into the winter and shoulder seasons. This in turn would create business for the key hospitality and service businesses and makes for a healthier, year-round tourism industry.

Like Golden, Revelstoke has the opportunity to benefit from nearby parks, which draw visitors from around the world. The significant investment in public assets and frontcountry infrastructure (museum facilities, heritage development, downtown revitalization give Revelstoke more of a tourism "position" than most communities in BC) is also a positive. However, these advantages, by themselves, are not enough to drive new activity in Revelstoke's backcountry tourism sector, and many in the community tourism sector believe the potential is still effectively untapped.

As with Golden, resource management and planning will be a determining factor in how the sector grows and whether it can generate the benefits that people expect. The fact that the community has been involved in coming up with locally developed user agreements on access to and use of the backcountry suggests that local models of resource management are possible and beneficial. Please refer to **Table One** for the SWOC Analysis of Revelstoke & District.

Table One

Revelstoke & District			
Strengths	**Weaknesses**	**Opportunities**	**Challenges**
▪ Proximity to National Parks ▪ Scenery, wildlife ▪ Terrain capability for adventure sports ▪ Area's natural resources supports a range of four-season outdoor recreation activities ▪ High quality, deep snow ▪ Accessible backcountry ▪ Developed outdoor adventure infrastructure and operators ▪ Skilled labour pool (guides, outfitters) ▪ In-migration of new outdoor recreation entrepreneurs ▪ Two large lakes in area (Upper Arrow and Revelstoke) ▪ Many developed trails and campsites ▪ High resident participation rate in outdoor activities ▪ Good implementation capacity for tourism development ▪ Available CR tenure in most products (except heli-ski)	▪ Lack of zoning for recreation – conflict resolution ▪ Difficult winter access to quality outdoor recreation areas due to winter road closures Avalanche prone mountain roads ▪ No large airport ▪ Difficult access to high quality summer outdoor recreation areas due to remoteness ▪ Conflicts amongst some user groups ▪ Limited public access points to Upper Arrow Lake ▪ Some conflict between the tourism and forestry sectors over the use of the backcountry and focus on job creation ▪ Lack of infrastructure to support some outdoor activities ▪ Lack of operator skills in business, marketing, hospitality ▪ Conflicts in expectation between tourism sector and resource extraction sector	▪ Available capacity for more outdoor recreation commercial operators ▪ Numerous opportunities for backcountry product development, especially: - winter products - multi-day summer experiences - multi-activity packaging ▪ Park-related opportunities: - Diversion of summer season tourists from over-capacity park venues - Accommodation targeted at park visitors – Shoulder season outdoor products ▪ Marketing cooperation with Golden on a "Rockies experience"	▪ Ensuring sustainability ▪ Cumbersome regulatory process for acquiring a commercial recreation tenure ▪ Conflicting use of landscape between resource extraction and recreation activities ▪ Perceived public restricted access to crown lands ▪ Resident and merchant attitudes toward tourism ▪ Distance from markets ▪ Intervening opportunities ▪ Under-developed backcountry infrastructure ▪ Highway improvements and transportation linkages ▪ Wildlife management compatibility (Grizzly Bears, Caribou and other ungulates). ▪ Much of the area is under various commercial recreation tenures ▪ Managing overlapping CR tenures. ▪ Future resolution of First Nations land claims

5.1.2 Golden

Golden's greatest strategic asset is its proximity to six national parks and the opportunities this affords for tourism development of all kinds, including backcountry recreation. Because it can offer many of the terrain and resource features found in the parks, the tourism industry in Golden can tap into the park visitor market more so than it is doing now. Limited capacity and limited new development in parks should lead to spillover change into neighbouring backcountry areas. This opens up the opportunity for significant gateway development that incorporates market, product, infrastructure, human resource and community development in a cohesive, sustainable fashion.

Land and resource management will have a major impact on how successful this transition to a more diversified backcountry tourism sector will be. The challenge to sustain the quality of resource attributes and minimize conflict with other resource users such as forestry will be a telling factor. Local efforts to guide development of the tourism sector will have to focus on upgrading hospitality services, workforce and community support. The close proximity to Alberta represents a market advantage for Golden, but the community will have to react proactively to capture the related job and income benefits it needs to diversify its economic base. Please refer to **Table Two** for the SWOC Analysis of Golden & District.

Table Two

Golden & District			
Strengths	**Weaknesses**	**Opportunities**	**Challenges**
▪ Proximity to 6 National Parks ▪ Access to TCH traffic ▪ Proximity to Calgary airport ▪ Scenery, wildlife ▪ Terrain capability for adventure sports ▪ Accessible backcountry ▪ Developed outdoor adventure infrastructure and operators ▪ Available CR tenure in most products (except heli-ski) ▪ Heritage/history (e.g. Swiss Guides) ▪ Skilled labour pool (guides, outfitters) ▪ Many developed trails and campsites ▪ High resident participation rate in outdoor activities ▪ Good implementation capacity for tourism development	▪ Lack of zoning for recreation – conflict resolution ▪ Lack of coordinated focus for tourism businesses ▪ Community attitudes towards tourism ▪ Uncoordinated tourism information ▪ Lack of overall tourism/hospitality infrastructure within the Town of Golden ▪ Lack of operator skills in business, marketing, hospitality ▪ Lack of operating guidelines to ensure protection of sensitive resources. ▪ Poor highway conditions ▪ Conflicts in expectation between tourism sector and resource extraction sector ▪ Lack of attractions ▪ Lack of designated wetlands protection ▪ Poor air quality conditions from seasonal burning	▪ Park-related opportunities: - Diversion of summer season tourists from over-capacity park venues, especially tour groups – Accommodation targeted at park visitors – Shoulder season outdoor products – park service opportunities ▪ Park Gateway development – creation of gateway positioning through coordinated signage, infrastructure and visitor information ▪ Spinoffs from major project development (Kicking Horse) ▪ Heritage development and interpretation (history/CPR) ▪ Hut-to-hut system for supporting winter and summer backcountry activities ▪ Marketing cooperation with Revelstoke on a "Rockies experience"	▪ Ensuring sustainability ▪ Possible re-routing of highway ▪ Perception of difficult winter access ▪ Highway "strip" development ▪ Commercial backcountry policy ▪ Resource use conflicts ▪ Competition with National Parks ▪ Resident attitudes toward tourism ▪ Wildlife management compatibility (Grizzly Bears, Goats, Deer and other ungulates). ▪ Wetlands protection ▪ Visual quality management ▪ Future resolution of First Nations land claims.

5.2 Activity Selection Process

The Terms of Reference for the Tourism Opportunity Strategy called for the selection of ten key tourism products / activities to be examined and studied in greater detail. Within the Columbia Forest District, a wide variety of recreation and tourism activities currently are occurring throughout the district. The study team used the results of a recently completed Revelstoke Area Recreation Inventory[1] on the west side of the district to develop a comprehensive list of potential activities that might be examined for new or enhanced tourism opportunities. The comprehensive list attempted to capture all of the varied and diverse recreational activities that were occurring within the western half of the district. Give the similarities of terrain, recreational use patterns and statistics throughout the entire Columbia Forest District, it was deemed appropriate to use this comprehensive list as a starting point for the selection of recreational activities for the TOS process.

The terms of reference for the TOS stated that the focus of the study would be on "…ecotourism, adventure travel and culturally based tourism development…." This helped to provide some initial direction as to which activities to consider. The comprehensive list of potential activities was presented to the project Advisory Committee (left hand side of the table below) and the committee members were taken through a consensus selection process to determine which ten activities were to be examined. The committee selected the ten activities (on the right side of the table) below for detailed analysis and the identification of potential business opportunities.

LIST OF POTENTIAL ACTIVITIES		SELECTED ACTIVITIES
Alpine Skiing	Hunting	
ATV'ing	Mountain Biking	Canoeing / Kayaking
Berry / Mushroom Picking	Mountaineering	Cross-country skiing
Camping / Cabins	Nat. & Cult. Features Viewing	Fishing
Canoeing / Kayaking	Paragliding	Hiking
Cat-skiing	Power Boating	Mountain Biking
Caving	Rafting	Mountaineering
Cross-country skiing	Rock climbing	Rock climbing
Fishing	Rowing	Nat. & Cult. Features Viewing
Heli-hiking	Ski touring	Ski touring
Heli-skiing	Snowmobiling	Snowmobiling
Hiking	Touring (Auto)	
Horseback Riding		

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[1] Revelstoke Area Recreation Inventory, Revelstoke Community Futures Corporation, July 2000.

5.3 Activity Description and Analysis

This section describes the ten activities and provides a market analysis and resource analysis for each, as well as the identification of "high opportunity" areas for business expansion or new business creation in the Columbia District.

The market analysis first provides information on demographics related to the activity, and then describes psychographic profiles for each of the market segments that participate in this activity. A local assessment follows that ties broad market conditions to the local area. This information is provided in table format for ease of reference by the reader.

The table below is an illustration describing how the subsequent tables can be used.

Target Markets	Market segments which have the best current and future potential for further development are identified. Markets may be segmented by geographic origin or psychographic profile. Emphasis is given to travel markets already visiting the region.
Competition	Those regions which offer the same or similar products/activities and which, therefore, compete for market share are identified. Reference is made to the competitive situation within the province, then internationally.
Demand	This refers to the anticipated demand for the product based on an analysis of participation rates, travel trends inside and outside the region and forecasts of future activity.
Development Factors	Development factors are considerations a community or entrepreneur would have to be aware of prior to developing a product/activity. These can cover a wide range of topics from access to land/labour/capital resources, to community impacts and support, to technological and safety innovations prominent in the industry.

Subsequently, a resource analysis is provided that examines the physical parameters (terrain and infrastructure) required to maximize the potential for business development within each activity, and identifies the issues that need to be considered in pursuing business expansion or development. This information is also provided in a table format to facilitate use. Appendix 4 of this report provides a listing of the resource agencies and contact persons that can supply pertinent information on many of the issues requiring resolution in tourism business development.

Terrain/Location Factors	Terrain factors will be identified in this box. These include the physical parameters of the landscape required to undertake an activity, such as slope, aspect, elevation, variety of terrain, weather and snowpack conditions, etc. Location factors include proximity to important infrastructure or other features such as accommodation, trails, communities, access points, staging areas, etc.
Infrastructure Requirements	Infrastructure requirements will be identified here. These may include buildings for accommodation, offices, storage or maintenance. It may also include specialized equipment, transportation, guide services, or any other "built" facilities or services required to undertake the activity in question.

Environmental / Wildlife Issues	Environmental or wildlife issues will be identified in this box. Wildlife encounters, habitat requirements, and/or special regulations that pertain to protected areas etc. must be considered in developing a tourism-related business. The need for human waste management, sensitive terrain considerations, and cumulative environmental effects issues may also be identified.
Access or Land use Issues	Access and land use issues are identified in this box. This will include such issues as access to suitable terrain. Proximity between the terrain and the base of operations for an activity may be an advantage. Land use issues such as zoning, government land use regulations and First Nations issues are also identified here.
Tenure or Legal Issues	Tenure and legal issues such as permit requirements, existing tenures, volunteer agreements, and private property issues are identifies here.
Capacity or conflict Issues	This box identifies any capacity or conflict issues for the activity. These may include problems with too many participants in one area, crowding that may affect wildlife, or conflicts between different user groups or operators.

The tables are followed by a section on **Overall Potential** describing the potential of the product to attract visitors or increase length of stay based on consideration of resource quality, existing market profile and market trends. Two final sections identifying **Potential Business Opportunities** and **High Opportunity Areas** within the Columbia District complete the analysis.

Within many of the high opportunity areas identified for the ten activities, there are existing commercial recreational tenures, It will be incumbent upon the proponent of a new business opportunity or venture, to work cooperatively with the existing tenured holders, to minimize conflicts between their different commercial recreation businesses.

Snowmobiling

5.3.1 Snowmobiling

5.3.1.1 Activity Description

This activity involves the use of snowmobiles to enjoy and explore trails and remote alpine backcountry areas. Snowmobiling occurs extensively throughout the study area in appropriate terrain. The season of use is Late October to early June, with the peak occurring between December and April.

5.3.1.2 Market and Resource Analysis

Demographics

The snowmobile market in Canada is evenly distributed amongst age groups, with a significant portion 35 and over (60.1%). Almost three quarters are male and half travel with friends. While the median age is 41, many younger people are being introduced into the activity through family outings. 94.5 percent of snowmobilers consider it a family sport with an average of 3 people within a family participating.[2] While the activity has traditionally been male-dominated, there are an increasing number of women, couples, retirees and families participating associated with the general increase in the soft adventure market. The snowmobile market is also considered relatively affluent. In the US, 70 percent of snowmobilers have annual household incomes of $50,000 or more.[3]

Recent statistics generated by the Resort Municipality of Whistler show snowmobile clients to be in the 30-40 year age range, 40% of which are Japanese with the majority of the remainder American.[4] This group is classified as participants who are taking on snowmobiling as a day activity as a part of longer trip involving other activities. They do not have their own snowmobiles and require gear as well as basic operating and safety instruction. Guided snowmobile tours, usually lasting from two to three hours, appeal to non-skiing visitors, skiers looking for an alternative to the slopes, or as an après ski activity.

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers : 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

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[2] "People who snowmobile", International Snowmobile Manufacturer's Association website, 1997.

[3] University of Montana study, International Snowmobile Manufacturer's Association website.

[4] The Sea to Sky CBR Opportunities Study, p.42, SVI. Environments, Consultant.

Snowmobiling **enthusiasts** are those who engage in the activity several times a year. 24 percent of snowmobilers take overnight trips. Snowmobilers who take an average 3 to 5 trips a year include 2 nights per trip at the destination area.[5] Enthusiasts are more likely to live near areas that have good snowmobiling terrain, own snowmobiles and be part of a local snowmobiling club or association. They look for challenging terrain that includes "powder play areas" – large, open areas with high snowfall – as well as a well-maintained, integrated network of trails for touring to interesting and unique destinations.

Participants often take on snowmobiling as a day activity as a part of longer trip involving other activities such as downhill skiing. They will not have their own snowmobiles and will require gear as well as basic operating and safety instruction. Participants will value the scenery and wildlife viewing opportunities in addition to the thrill of operating the snowmobile. Participants will go on guided tours whereas enthusiasts are more likely to plan a trip on their own.

Snowmobilers seeking hard or **extreme adventure** will look for challenging and varied terrain with features such as untracked powder and jumps. If they are renting equipment, they will look for high-performance snowmobiles. Soft adventure travellers are similar to the profile of participants above. While they enjoy the activity of snowmobiling, snowmobiles are quite often seen as a means of getting access to wilderness and other town destinations while enjoying the outdoors.

Market Assessment

Target Markets	▪ Regional and Canadian short-haul snowmobile markets. Participation by US and international visitors is minor. ▪ Soft-adventurers who are participating in other winter destination activities such as downhill and cross-country skiing.
Competition	▪ Snowmobilers have a broad choice of destinations right across the province. The BC Snowmobile Federation is active in building a province-wide trail network much like exists in Ontario and this will improve access to quality terrain in affected communities, but it will also increase participation. The keys to creating a competitive product (e.g. good snow conditions, variable terrain, integrated and well-signed/maintained trail systems, and access to higher alpine terrain and scenic destinations) are present in the Columbia.
Demand	▪ Snowmobiling is growing extremely fast, perhaps more so than any other outdoor activity, motorized or non-motorized. The increased demand and use is coming from residents, regional visitors and short-haul visitors. The Columbia is in close proximity to the large and growing Alberta market. Another market is park visitors. Since snowmobiling is not allowed in the parks, there will be a growing demand among other winter visitors (especially downhill skiers) who will be interested in snowmobiling as a

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[5] Economic Impact survey, Snowmobiling American Council of Snowmobile Associations website.

	secondary activity.
Development Factors	- Land use and resource management is a major issue for snowmobiling, especially in those areas where there is growing use among competing motorized and non-motorized participants. Snowmobiling is one activity that seems to conflict the most with other winter recreation participants, especially non-mechanized recreation. Land managers have responded by trying to spatially separate users but this has not always been effective. In the Golden Area, a Recreation Access Management Planning exercise is attempting to resolve recreation conflicts through the implementation of locally devised management plan. - The BC Snowmobile Federation BCSF has been negotiating with the Land Use Coordination Office (LUCO) for a provincial trail network, changes to improve safety for snowmobilers, changes to make it easier for snowmobilers to operate legally (e.g. crossing highways) and changes to allow local interests to secure and maintain snowmobile trails. Legislative and policy changes are now being discussed with LUCO. - Avalanches, inclement weather, clouds and resulting loss of visibility are hazards that are increasing in profile as sledders continue to push the limits advanced by technology. As the areas considered suitable for snowmobiling expand in the backcountry, there is a corresponding increase in danger related to natural occurrences such as avalanches. Only 5 to 15 percent of snowmobile incidents occur on well-maintained, designated trails where 80 to 90 percent of snowmobiling takes place.6

Resource Analysis

Terrain / Location Factors	- Snowmobiling requires a variety of terrain to accommodate all skill levels form beginner to advanced. The advanced riders often prefer remote high alpine terrain with steep slopes and deep powder conditions. Beginners and families are looking for more subdued terrain or trails more consistent with their riding abilities and consequent enjoyment. - In all cases, good snow conditions are required. On frequently used trails, grooming is essential for both comfort and safety of the riders. - Trailheads located close to major (paved & plowed) roads are a huge advantage for facilitating access and increasing volume of participants. - The Columbia District generally has some of the best snow conditions anywhere for this activity; however, the terrain is generally more suited to more advanced riders, as it is often steep and avalanche prone.
Infrastructure Requirements	- Nearby accommodation, particularly if it provides direct access to trails, is a great advantage for capturing snowmobile business. Quality après snowmobile activities are a growing requirement for destination snowmobilers. - Adequate and secure parking is a requirement as expensive tow vehicles and trailers are left for long periods of time. - Warm-up huts and cabins are a bonus for day riders and a requirement for multi-day hut-to-hut tours. - Good signage is important for both convenience and safety reasons.

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[6] "Snowmobiling Safety", Snowmobiling American Council of Snowmobile Associations website.

	▪ An operations base is needed for repairs and maintenance. Fuel storage is another important requirement, both at the operations base and remote fueling locations. Trailers and tow vehicles are needed for hauling to and from trailheads. ▪ Columbia District generally needs a significant improvement in supporting infrastructure for snowmobiling. ▪ Destination lodges generally can provide the necessary support, but at the cost of significant capital investment.
Environmental / Wildlife Issues	▪ Environmental issues faced by snowmobilers include human waste management, vegetation damage to trees (snapped tips and branches) and possible gas and/or oil spills. Noise pollution and noxious fumes are factors raised by some non-motorized recreation users in relation to snowmobiles. ▪ Wildlife Issues include potential interactions with caribou, goats and moose and possibly wolverine and grizzly bears in early season or late season. ▪ New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15]
Access or Land use Issues	▪ Large areas are required for snowmobile touring and there may be challenges in gaining access to areas due to environmental/wildlife or land use zoning restrictions. ▪ Although still in development, the Golden Recreation Access Plan –and associated Recreation Management Strategies, which identify the level of development that is appropriate within each Recreation Access Zone, will likely have a major influence on future commercial recreation activities. ▪ Use of or access over private land will require the permission of the private landowner. ▪ Use of logging roads for access may face conflict with active logging operations. ▪ Where activities occur within provincial Forest Recreation Sites, they must comply with the recreation management objectives established by MoF for the site. ▪ The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	▪ All commercial recreation activities occurring on provincial crown land require a tenure that is issued by British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures7. ▪ Snowmobiling is not permitted in National Parks. ▪ Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these licensees.

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[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

[7] The provincial Land Act requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

	▪ Commercial tenures are not exclusive and do not preclude public snowmobile activity, but tenures issued to other winter operators may limit commercial snowmobile operators from accessing some high quality terrain currently used for other purposes. ▪ Commercial activities taking place on Crown Land require appropriate liability insurance coverage.
Capacity or Conflict Issues	▪ The popularity of snowmobiling and sheer numbers of participants have meant that some more accessible and popular areas are nearing the limit in terms of environmental or social carrying capacity. ▪ There are many areas in the Columbia District that are encountering conflicts between snowmobiling and non-motorized recreation, particularly ski touring. Planning exercises are beginning to designate and spatially separate areas for motorized and non-motorized forms of recreation.

5.3.1.3 Overall Potential

The large snowfall, the allure of high alpine "powder" snowmobiling areas and the remote and spectacular scenery are all significant advantages for the Columbia District. The overall potential for snowmobiling in the district is good, but commercial development will hinge on several key factors. First, more snowmobile participants have to be convinced to purchase either guiding services or lease equipment and gear. This can only be done by adding value and service to the snowmobiling experience. Second, there is a need to improve infrastructure and hospitality services to encourage longer and more frequent trips. And third, access to the best resources will be required. Land management and tenure policy will play big roles in this matter. From a commercial perspective, access to high quality alpine destinations is very important – access that is restricted or too distant will deter investment.

From a product perspective, new ideas that communities could explore to create snowmobile destinations include:

- The primary undeveloped opportunity is in the touring sector, which could be encouraged with more backcountry infrastructure (e.g. hut development) and tour packaging. Integration into the provincial trail network advocated by the BCSF would also open up this sector.
- Snowmobile instruction and tours for specialty demographic markets including seniors and women.
- Product packaging potential with other activities such as lodges/resorts.
- Snowmobiling events (e.g. BCSF sanctioned snowcross).

Revelstoke is already well established as a regional snowmobile destination and has extensive community involvement in the management of the resource. The Revelstoke Snowmobile Club (RSC) in cooperation with the Ministry of Forests collects fees for snowmobile use on Frisby Ridge and Boulder Mountain to help defray the cost of trail maintenance and grooming. Snowmobile agreements involving RSC, the BC Snowmobile Federation, government agencies and other user groups have been negotiated for Frisby, Sale and Keystone areas.

Revelstoke Snowmobile Tours and Great Canadian Snowmobile Adventures are actively marketing Revelstoke as a snowmobile destination and future use can be expected to increase. Already there are concerns that congestion in town and in some of the play areas may begin to negatively impact the visitor experience. Before the next level of development can occur, Revelstoke will need to have targeted infrastructure in place to control and direct use and ensure a quality visitor experience while preserving recreational opportunities for residents.

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *Snowmobiling* tourism product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Please refer to **Appendix 3** for the detailed workshop results.

Snowmobiling Product Ideas	
Revelstoke	**Golden**
▪ Hut to hut tours* ▪ Hot spring to hot spring tours ▪ Family tours (1-2 hours) – flat trail riding ▪ Food/fuel/service depot ▪ Snowmobile camps* ▪ Test track* ▪ Snowmobile skiing area ▪ Tours for railway fans ▪ Full Service alpine lodge for snowmobilers ▪ Trail maintenance and grooming*	▪ Destination snowmobile lodge with access to remote backcountry areas ▪ A snowmobile trail grooming and maintenance business (including sign and trail map maintenance) ▪ Remote trail fuelling stations with temporary shelters that can provide hot food service, portable washroom facilities)* ▪ Snowmobile terrain complex*

5.3.1.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are 6 areas that have the highest opportunity values for the activity of Snowmobiling, resulting from the preceding *market assessment* and *resource analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 1**).

Figure 1: Snowmobiling Map

North Dogtooth / Quartz Creek

This area is a popular local and destination area that has a variety of terrain from beginner to advanced. It has a network of established trails including groomed trails. Access is easy directly from Highway #1 about 50 km west of Golden (Quartz Creek) and from the new Kicking Horse Resort. There is usually a good dependable snowpack and it is an established snowmobile area. There are relatively few snowmobile tenures established in the area. There is a parking lot and day hut at Quartz Creek.

However, there are heli-skiing tenures in the area, and some areas have been zone out for Snowmobiling as per backcountry agreements. There some microcosms of restrictions such as confined linear corridors around the new Kicking Horse Resort. There are some wildlife issues in the area, such as important Mountain Goat habitat. Holt Creek is an area of contention (may be restricted in the mid-section). Some of this terrain has high avalanche danger, and participants should be experienced riders or be accompanied by guides. The area is adjacent to Glacier National Park and attention is required not to venture into the park, which is restricted to Snowmobiling.

Blackwater Ridge /Marl Creek

This area has a multitude of trails for family riding. It is popular with beginner to intermediate riders. Access is easy – directly from Highway #1, 20 km west of Golden. There is very little avalanche terrain and therefore it is safe riding. There is a groomed trail system to Susan Lake. Ice fishing at Susan Lake and Jump Lakes is an added attraction. This is a recognized snowmobile area and conflicts with other users are very few. The area has good loop riding, so participants can enjoy short or long day trips without retracing their route home.

There are some potential conflicts with ungulates (Deer, Moose, Elk). Portions of the area are under dispute in the Golden Recreation Access Planning process for this reason. Parts of the area may be zoned "non-motorized". Some snowmobile tenures exist in the area, but it is not considered to be at capacity. Lower Marl Creek is closed except for a few corridors. Trails in the Marl Creek area are in need of some maintenance.

Mid / Upper Blaeberry River

The scenic Blaeberry River corridor is a wonderful family riding experience. This area is very close to Golden and access is very straightforward. There is a loop opportunity – riding up one side of the river and down on the other. The top end of the valley in the Collie and Enson Creek areas presents more advanced terrain for experienced riders. Generally this area has low avalanche hazard. The upper valley is all crown land. There is a lot of privately owned land in the lower valley close to Golden.

There are some wildlife issues in this area (winter ungulate range). Agreements are also in place with Amiskwi and Mistaya Lodges to avoid conflicts with lodge guests who are typically "non-motorized" users.

Boulder Mountain

The Boulder Mountain area is located 3 km west of Revelstoke and is immediately accessible off Highway #1. There are parking facilities and rental, repair and accommodation facilities all directly accessible from the parking lot, which is directly at the trailhead. There is a groomed trail system and warm up huts near the summit maintained by the Revelstoke Snowmobile Club. Signage is available to help riders find their way. Because of the excellent snow and riding terrain, its proximity to Revelstoke and the facilities available to riders, Boulder Mountain is by far the most popular Snowmobiling area in the district. It is estimated that over 9,000 riders use the area each winter, and the number has been growing steadily for the last several years.

There is currently one snowmobile tenure in the area. Because this is a recognized snowmobile are, there are few conflicts with other types of users. However, the question of whether the area has reached capacity is a major consideration.

Frisby Ridge

Frisby Ridge is also very close to Revelstoke, located 5 km northwest of town with access from Westside Road. There is parking and a groomed, well-signed trail system and summit warming-hut maintained by the Revelstoke Snowmobile Club. As with Boulder Mountain, the snow conditions and riding terrain are excellent, making it a very popular area for more experienced riders. A destination lodge has recently opened at the base of this area, catering to year-round activities. The operators of the lodge have a snowmobile tenure on Frisby Ridge.

There is significant late winter caribou habitat on Frisby Ridge and an area closure is in effect for a portion of the ridge. As with Boulder Mountain, the question of whether the area has reached capacity is a consideration. Discussions are currently underway to determine the appropriate amount of recreational use of the area. Riders are urged to be aware of and avoid harassing wildlife at all times. There is one existing snowmobile tenure in the area.

Keystone – Standard Basin

This area is growing in popularity with local riders and is just being discovered by destination riders. Access is from Highway #23, 45 km north of Revelstoke. The area has dependable snow conditions and excellent riding for intermediate to advanced riders. There are no groomed trails or facilities available to riders. Parking is first come—first served in small pullouts along the highway. There is a heli-skiing tenure in the area, but the operator doesn't use the northern portion of the area very frequently. There is more potential for conflict with heli-skiers in the southern portion around Standard Basin. The area is busiest on weekends, but during the week there is often only a few riders in the area and it is not considered to be at capacity. There are caribou in the area and riders should maintain an appropriate distance if wildlife is encountered. Discussions are currently underway to determine the appropriate amount of recreational use of the area.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Snowmobiling Issues	North Dogtooth/ Quartz Creek	Blackwater Ridge/ Marl Creek	Mid – Upper Blaeberry	Boulder Mountain	Frisby Ridge	Keystone / Standard Basin
Infrastructure Needs						✓
Env't/Wildlife	✓	✓	✓	✓	✓✓	✓
Access/Land Use	✓	✓				✓
Tenure/Legal	✓	✓	✓	✓	✓	✓
Capacity/Conflicts				✓		

Ski Touring

5.3.2 Ski Touring

5.3.2.1 Activity Description

Ski touring is a backcountry skiing activity that utilizes either specialized mountaineering or telemark ski equipment. Participants typically are physically fit, with at least intermediate to advanced skiing abilities, as this form of skiing is demanding. They undertake ski touring on a day-use or multi-day basis. With multi-day trips, participants stay in tents or snow-caves, or in backcountry cabins. Commercial operations are almost exclusively based from wilderness cabins. Most operators focus on "powder skiing" similar to the heli and cat skiing operators, although there is usually an added component of travel over variable scenic terrain as part of the experience. The significant difference is the exclusive reliance on self-propelled transportation. The tops of the runs are gained by attaching "skins" to the bottom of the skis and literally hiking on the snow. There is also a greater premium placed on pristine wilderness and lack of motorized vehicles.

5.3.2.2 Market and Resource Analysis

Demographics

Nordic skiing includes any skiing activity that is "free-heeled" – where the ski bindings are not attached at the heel as opposed to alpine ski bindings. Nordic skiing has been broken down into the following categories:[8]

Surface	Classic	Skating	Telemark	Ski touring
Tracks	▨			
Groomed	▨	▨	▨	
Backcountry	▨		▨	▨

The following discussion deals exclusively with backcountry telemark and ski touring. Other nordic skiing activities are profiled in the cross-country ski section of this report.

Ski touring is a specialized activity that does not enjoy widespread popularity, mainly because of the skill involved, and the distance between population centres and ski touring areas. Slightly more than three percent of North Americans participate in nordic skiing, a figure which has grown by 24% over the last decade.[9] Although no official numbers exist, the percentage of this activity accounted for by ski touring is believed to be very small.

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[8] "Nordic Skiing: Kick Up Your Heels", www.rei.com.

Despite its overall low participation rates, ski touring has an important profile in the study area, counting as a significant activity among backcountry lodges and within national parks. In fact, the most rapidly growing segment of the national parks' adventure recreation segment is the backcountry ski-tourer. These visitors tend to be highly skilled, environmentally aware, self-dependent and possess a reasonably good level of self-rescue capability. They also tend to overnight in the parks.[10]

Backcountry ski-touring can take place on a day-use or multi-day basis, the latter including tent or cabin accommodation. Most commercial operators are based in remote lodges or provide access to and from cabins/huts. The popularity of this activity in the national parks is indicative of the value being placed by users on scenic viewscapes, wilderness and lack of encounters with other users, particularly motorized vehicles.

The long-term demand trend for ski touring is unclear. While participation levels may be increasing, there are no statistics to support it. It will likely remain a niche activity because of the energy, skill, equipment and time requirements needed to participate. However, as technology and transportation options improve and as safety considerations figure more prominently in product development, the appeal to the soft adventure market will undoubtedly increase.

Market Assessment

Target Markets	▪ Experienced/hard adventurers from all markets, with the best potential in the Columbia among short-haul US and Canadian markets. ▪ Soft adventurers (destination-oriented decision-makers) who may be introduced to ski touring given up-to-date ski technology, safe conditions and quality instruction.
Competition	▪ There are several areas in BC and Alberta with quality ski touring terrain. In neighbouring regions such as Alberta, there are dozens of huts within a day's ski from main highways that are popular as multi-day and weekend destinations. The quality of ski touring in the Canadian Rockies is recognized worldwide and this has prompted the national parks to actively promote the activity. For commercial operators, the main challenge is in attracting clientele. The chances of converting self-guided ski tourers to purchasers of services will be very challenging. In addition to the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost. Anecdotal evidence suggests capacity is rarely

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[9] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-21, The Randolph Group, January 1997.

[10] Heritage Tourism Strategy Mount Revelstoke and Glacier National Parks Rogers Pass National Historic Site, Parks Canada, December 1999.

	exceeded at these cabins.
Demand	▪ Demand is low but growing for this product. As skiing technology improves (e.g. touring skis are now more shapely, giving beginners increased performance with less effort for activities like telemarking) and as lift-service options expand, ski touring will become even more accessible to a broader market.
Development Factors	▪ On Crown land, good terrain is likely to be valued by snowmobilers but the presence of mechanized transportation of any form (helicopters, snow-cats, snowmobiles) will be problematic for ski touring development. Still, the actual area needed for ski touring is not that large (e.g. 20 square kilometres) compared to other backcountry users like heli-skiing and snowmobiling. The existence of other winter commercial tenures can have a negative impact on the amount of terrain available to initiate a ski touring business. ▪ As a low-key, backcountry product, further ski touring development is unlikely to have a significant impact on socio-economic measures in the study area. Employment and economic impacts are minimal as participation levels are low and spending modest. Nevertheless, any increase in activity would be positive and add to the overall tourism capacity of the area. Increases in winter visitation would benefit the hospitality sector, in particular, as capacity utilization is low during these months. Backcountry skiing associated with backcountry lodges would have the greatest overall impact.

Resource Analysis

Terrain / Location Factors	▪ Ski touring requires a variety of terrain to accommodate a range of skill levels from beginner to advanced / expert. The typical ski touring terrain can range from forested valley bottoms and side slopes, to sub-alpine, alpine and glaciated areas. Generally, stepper areas are preferred to flatter areas. Overall vertical height can range from hundreds of meters to thousands of meters. Longer, sustained runs are preferred to short, broken terrain. Good ski touring areas have all or portions of these characteristics to accommodate changing climatic and avalanche conditions. ▪ Typically, ski touring terrain is often associated with avalanche terrain. Steeper slopes that make for good ski touring, tend to be also prone to avalanches. Areas that have a variety of terrain conditions from forested, to sub-alpine and alpine, are preferred. These areas let the ski tourer choose runs that are commensurate with the forecasted avalanche hazard. ▪ Areas of moderate to high snow pack accumulations are preferred ski touring areas. These areas tend to provide for more consistent snow packs. Generally speaking, the Columbia Forest District climatic and geographic conditions tend to produce more stable snowpacks and thus avalanche conditions than the near by Rocky Mountains. ▪ Depending on the nature of the ski tour experience sought, areas that are either inaccessible by road, or conversely accessible by road, may be preferred.
Infrastructure Requirements	▪ Infrastructure requirements for ski touring are minimal as the lack of development and access to wilderness is what attracts users in the first place. However, convenience of access and more backcountry accommodation will attract more users. Road access, or in some cases other forms of motorized transportation, to within a reasonable distance of the activity is a critical factor

	in the success of a ski touring business. ▪ Plowed winter road access to trail heads that lead to good ski touring terrain. ▪ Secure vehicle parking at trail heads. ▪ Backcountry huts and cabins are advantageous for ski tourers who are out for a number of days. ▪ Access to daily avalanche forecasts can assist day ski tourers chose the days ski destination. ▪ Nearby accommodations for day ski tourers
Environmental / Wildlife Issues	▪ Potential wildlife species affected might include ungulates in their winter ranges, mountain goats and sheep, wolverines, and grizzly bears (spring). ▪ New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15] ▪ Environmental issues faced by ski tourers include human waste management. ▪ The small numbers of participants who move slowly on skis limits impacts on wildlife. Skiers should, nonetheless, refrain from approaching wildlife and causing them any distress. Facilities such as cabins should be located away from important wildlife areas. Likewise, helicopters being utilized for transporting clients should be routed away from wildlife use areas.
Access or Land use Issues	▪ Road access to within a reasonable distance is a critical factor in the success of a ski touring business. Clients may be flown by helicopter to the lodge or cabin that serves as a base of operation, but a 15-20 minute round trip is generally seen as a limit for commercial viability. The availability of good hut or cabin locations is also an important criterion when considering the suitability of areas. Many areas that appear as having high or moderate capability may be in areas that are prone to avalanches. ▪ The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. ▪ Use of logging roads for access may face conflict with active logging operations. ▪ Use of or access over private land will require the permission of the private landowner. ▪ Where activities occur within designated Forest Recreation Sites, they must comply with the recreation management objectives established by the Ministry of Forests for the site. ▪ The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	▪ All commercial recreation activities occurring on provincial crown land require a tenure that is issued by the British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures11. ▪ Commercial ski touring activities occurring within National Parks, require the

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[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

[11] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

	acquisition of a Business License and compliance with National Park regulations[12]. ▪ Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these forest licensees. ▪ All commercial activities that occur on provincial crown land require appropriate liability insurance coverage. ▪ The ongoing process of Native Land Claims between First Nations and the Federal and Provincial Governments may present a major caveat for potential commercial and private recreational activities in some areas. First Nations may be accorded rights that would give them direct control over the type and amount of commercial activities that would be permissible. ▪ Other winter commercial tenures can have a negative impact on the amount of terrain available to initiate a ski touring business. Forest tenures are also problematic for ski touring as the activity relies heavily on unmodified landscapes as a principal attractant. Although most ski touring activity takes place in the alpine and subalpine zones where forestry values are minimal, visually altered landscapes are visible for miles and negatively affect the experience. Privately owned land is not a major issue in the district.
Capacity or Conflict Issues	▪ Ski touring is highly sensitive to congestion. Ski tourers typically prefer less congested areas. As the popularity of ski touring has increased in the past number of years, so too has congestion at popular ski touring destinations. ▪ A pristine wilderness environment is a primary criterion for participants in this activity. Peace and solitude in a natural setting is an important part of their experience. The presence of mechanized transportation such as helicopters, snow-cats or snowmobiles is, therefore, usually incompatible with ski touring, unless it is for access or egress purposes. It is desirable to separate these uses geographically wherever possible. ▪ Because of relatively small spatial requirements, ski touring may be able to co-exist within heli-skiing areas if operators are willing to cooperate. It is also generally recognized that the presence of ski tourers does not significantly affect heli-skiing and cat-skiing if participants respect each others' operations. Snowmobiles, however, are generally viewed as having a negative impact on ski touring. Much of this view is based on differing attitudes on use and enjoyment of the natural environment. Ski touring clients tend to view the wilderness as a quiet place for contemplation where nature can be appreciated on its own terms. Mechanized uses such as snowmobiling tend to cater to those seeking thrills and an adrenaline rush. Although the distinction is probably more founded in perception than reality, it nonetheless has a significant affect on the ability of users to coexist. Establishment of commercial ski touring operations can dramatically increase the intensity of use on preferred terrain that is easily accessible from local communities. Since exclusive or low-density use is highly valued, local recreation conflicts can occur.

5.3.2.3 Overall Potential

The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. Although the possibility of hut to hut skiing was raised by participants in the Revelstoke Workshop, the opportunities seem limited in light of the potential for conflicts with other users. The opportunities seem to lie in the area of traverses, independent daily guided activities or use of existing huts.

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[12] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations.*

Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *Ski Touring* product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Please refer to **Appendix 3** for the detailed workshop results.

Ski Touring Product Ideas	
Revelstoke	**Golden**
▪ Hut to hut tours* ▪ Lodge –based tours* ▪ Multi-day, multi-experience tours (Ski touring, snowmobiling, ski-mountaineering, snowshoeing, XC skiing)* ▪ Ski touring Lodge (Mica Area) ▪ Snowmobile assisted ski touring ▪ Rental/Sales shop in town	▪ Guiding ski touring services* ▪ Providing access by snow machine to remote backcountry areas (shuttle service) for ski tourers ▪ Backcountry accommodations (hut to hut system, temporary structures)* ▪ Development of guide book, guide/accommodation booking service

5.3.2.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are six areas that have the highest opportunity values for the activity of ski touring resulting from the preceding *Market Assessment* and *Resource Analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 2**).

Figure 2: Ski Touring Map

The Gold Range

The Gold Range is in the far southwest corner of the district. It is bounded on the west by the Forest District boundary, on the north by the Trans Canada Highway, to the east by Upper Arrow Lake, and to the south by the southern Forest District boundary. Mount Begbie, Blanket Glacier, and Mount MacPherson are the most popular ski touring destinations within the Gold Range, especially for local residents and destination ski tourers (Blanket Glacier Chalet). The Gold Range has dependable snowpack conditions with a long ski touring season. Like all areas of the district, the Gold Range has hazardous avalanche terrain. There is a variety of terrain suitable for beginners at the Blanket Glacier Chalet, with expert runs off numerous peaks within the Gold Range. Access to popular routes on Mount MacPherson is relatively easy from Hwy 23 South through the Mount MacPherson Nordic Ski Trails network.

The area is within the commercial recreation tenures of Canadian Mountain Holidays (Revelstoke) for heli-skiing, the Nordic Ski Institute (Blanket Glacier Chalet) for ski touring. Other peaks within the Gold Range that are popular with snowmobilers including Hall Mountain, Empress area, Cranberry Creek, and to a lesser extent Mount Begbie, and the backside of Mount MacPherson.

Mount Revelstoke National Park / Tangiers Valley

The Mount Revelstoke National Park / Tangiers Valley has a number of areas that has high opportunity values for ski touring. These areas include the Inverness Peaks, Woolsey Glacier and Mount Klotz areas of Mount Revelstoke National Park, and the Albert Icefields, Corbin Pass, and Durrand Glacier areas. Access to these areas is generally more difficult, usually requiring a helicopter flight. The exception is Corbin Pass which can be accessed from the Trans Canada Highway. The area in general typically has good snowpack conditions, with a variety of skiable terrain.

The area is within the commercial recreation tenures of Selkirk-Tangiers Heli-skiing, Selkirk Mount Experience (Durrand Glacier Chalet), and Selkirk Lodge (Albert Icefields) for ski touring and mountaineering. The area also receives some use by snowmobilers. Mount Revelstoke Park is important winter range for Mountain Caribou.

Rogers Pass / Glacier National Park

Rogers Pass is one of the pre-eminent ski touring locations in North America. It has become a recognized destination for ski touring enthusiasts due to its plentiful snowpack and easily accessible and high quality ski touring terrain.

Given that the area is within a national park which prohibits the use of motorized transportation (helicopters, snowmobilers, snow cats, ATVs) in backcountry areas, ski tourers are assured of no conflicts with motorized winter users encountered elsewhere. The Trans Canada Highway runs through the middle of Rogers Pass thus providing car accessible access to variety of terrain including trees, open bowls, slide paths and crevassed glaciers. A good deal of the more adventurous terrain is subject to avalanche hazard.

A number of public backcountry cabins (Wheeler, Asulkan, Sapphire Col, Glacier Circle) provide opportunities for multi-day backcountry ski trips. Numerous licensed guides use the area as a location to take their ski touring clients. Rogers Pass has experienced tremendous growth in skier visitation over the last ten years. Parks Canada provides daily backcountry avalanche forecasts for areas within the park and has on staff, highly trained Park Wardens capable of providing search and rescue services should they be required.

The Adamants Range

The Adamants Range is located north of Glacier National Park and encompasses the peaks of Sir Sanford, Adamant, Doubletop, Goldstream, Centurion, and Sontata. It has long been recognized as a high opportunity area for ski touring. The area has excellent variety of skiable terrain suitable for a range of ski touring abilities, consistent and reliable snowpack, and existing backcountry cabins (Fairy Meadows, Great Cairn). Access to the area is primarily by helicopter.

The area is within the commercial recreation tenures of Canadian Mountain Holidays (Adamants) for heli-skiing, and the Alpine Club of Canada (Fairy Meadows, Great Cairn) for ski touring. Due to the large size of the area, conflicts between heli skiers and ski tourers are minimal.

The Esplanade Range

The Esplanad Range is located north of Glacier National Park and encompasses the peaks of Cherub Mountain, Copula Mountain, and Sentry Mountain. The area has excellent variety of skiable terrain suitable for a range of ski touring abilities, consistent and reliable snowpack, and existing backcountry cabins (Golden Alpine Holidays, Sorcerer Lake Lodge and a new lodge at Sentry Mountain). Access to the area is primarily by helicopter.

The area is within the commercial recreation tenures of Great Canadian Heli-skiing, Golden Alpine Holidays, Sorcerer Lake Lodge and Sentry Mountain for ski touring. The area is perhaps at capacity for backcountry lodges. There is some potential conflicts between ski tourers and heli-skiers with mountain goats.

Yoho National Park (Wapta Traverse, Lake O'Hara)

The primary high value opportunity areas for ski touring within Yoho National Park are the Wapta Traverse, and the Lake O'Hara area. Straddling the Continental Divide north of Lake Louise, Alberta, the Wapta traverse is probably the most widely travelled of all Rocky Mountain Icefields. Easily accessed from the Icefields Parkway in Banff National Park, the 150 square kilometre of contiguous glaciation offer the ski tourer and mountaineer a wide variety of routes to choose from. Serviced by four mountain huts, the icefield provides a variety of options for scenic multi-day high level ski tours comparable with those found in Europe. Yoho Park is the southern terminus of this famous traverse.

Lake O'Hara is a popular destination for beginner to intermediate ski tourers. The area can be easily accessed by skiing up the fire road that starts at the Trans Canada Highway in Yoho Park. This route is safe from avalanche hazards. There is an Alpine Club of Canada hut (Elizabeth Parker) and commercial backcountry lodge (Lake O'Hara Lodge) at Lake O'Hara. Both areas are used by licensed mountain guides as destinations for guided ski tours and ski mountaineering trips.

The following table summarizes the issues that are pertinent to each of the identified *High Opportunity Areas* for this activity.

Ski Touring Issues	**Gold Range**	**Mt Rev. / Tangiers**	**Rogers Pass**	**Adamants**	**Esplanades**	**Yoho**
Infrastructure needs						
Environmental / Wildlife	✓	✓	✓	✓	✓	✓
Access / Land Use		✓		✓	✓	
Tenure / Legal	✓	✓	✓	✓	✓	✓
Capacity / Conflicts	✓	✓	✓		✓	

Cross-Country Skiing

5.3.3 Cross-Country Skiing

5.3.3.1 Activity Description

Nordic Skiing, for the purposes of this study, involves the use of light nordic ski equipment and techniques on prepared (track-set) or groomed trails. It is typically a day use activity undertaken in scenic frontcountry areas in close proximity to an urban area or nearby resort. Equipment can be relatively inexpensive and requires only minor skill levels and fitness, although world-class athletes can and do participate in this sport. It is particularly well suited to families and people of all ages.

5.3.3.2 Market and Resource Analysis

Demographics

Cross-country skiing travellers in Canada have the following characteristics: [13]

- Younger, with 52.9% under 34.
- More likely female (54.2%).
- Travel in families (38.2%) or with friends (27.0%).
- Almost all from Canada or US (91.5%).[14]

More recent statistics for the US show that nordic skiers are evenly split between male and female. The majority of these skiers also participate in other outdoor sports such as hiking, camping and fishing and 25 percent are also alpine skiers.[15] Although cross-country skiing has seen the number of participants decrease over the last decade, the number of women learning to cross-country ski has been on the rise.[16] As well, participation has been increasing amongst senior citizens as the activity has been promoted as an excellent way to enjoy the outdoors and maintain a good level of fitness.

The most popular reasons given for why people ski include: 1) the whole family can participate together, 2) practical fun way to enjoy the outdoors during the winter, 3) social contact with other skiers on the trail and at ski area lodges, 4) ideal cross training sport for running and biking, and 5) weight loss - burns more calories per hour than any other sport.

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[13] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[14] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.48, 1995.

[15] SnowSports Industries America, 1999.

[16] SkiTrax, December/Holiday 1999, p.33, "Clear the Trails, Here Come the Grrrls!", Kate Carter.

The market for cross-country skiing is small but growing strongly. It has one of the lowest participation rates among North Americans of all products studied in this report, but future projections for participation are encouraging. John Hof's extensive research on future American participation indicates that snow and ice activities will grow proportionately faster than land-based activities. Of the 19 activities studied in his most recent analysis, cross-country skiing was projected to have the third highest growth rate in participation, following only sailing and downhill skiing.[17]

The number of Europeans and other overseas visitors who participate in this sport in Canada is negligible. The majority of cross-country skiers also participate in other outdoor sports such as hiking, camping and fishing; 25 percent are also alpine skiers.[18]

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers: 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

The **enthusiast** cross-country skier is usually a fitness buff who participates as a means of staying in shape during the winter and enjoys the physical exertion from the activity. Nordic skiing is an excellent aerobic workout that uses the entire body. This market segment is more likely to participate in classic and skate skiing on groomed runs where trails and distances are well marked. As well, fitness buffs are generally younger and participate in the activity alone or with friends. They participate in the activity several times a year, have their own equipment and look for performance skis. In most cases, they will rely on their network of friends and guidebooks when planning their trips.

The **participant** enjoys the social aspect of the sport and tends to participate with family and friends. The main purpose of the activity is to enjoy the outdoors during the winter. They will often require basic instruction and equipment rentals.

In the cross-country market, a distinction can be made between **Families with Children** and **Couples**. While this approach to segmenting the market is far from complete, it focuses on two key customer types within the market that are significant and have distinct needs. Families with children value good instruction for both the children and adults, activity areas specifically for younger participants, good ski rental facilities in terms of equipment quality and size selection and dining facilities catering to families. Couples will value not only the facilities and trails for the ski activity itself, but the overall ambience. Key elements to creating the appropriate ambience include the dining and accommodation, which can be designed to cater specifically to the couples market.

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[17] Outdoor Recreation in America, p 184, Clayne R. Jensen, 1995.
[18] SnowSports Industries America, 1999.

As with most other outdoor adventure activities, there are **destination-based** and **activity-based** decision-makers in the cross-country market. The destination-based segment will choose a destination that offers several activities, where cross-country skiing is one possible activity. They are more likely to participate in day tours on groomed trails in a multi-activity resort area and will try two or more different activities during their visit. Many participants within this category are alpine skiers who want to try something different for a day. Activity-based decision makers are avid nordic skiers who select the destination based on the best location for them to cross-country ski. They are also more likely to participate in backcountry ski touring.

Market Assessment

Target Markets	▪ Participants and enthusiasts from BC and short-haul markets, especially Alberta. The US and overseas markets are limited, but downhill skiers of all geographic origins are a potential target.
Competition	▪ There are many well-established cross-country ski areas in BC and Alberta that offer similar terrain features and snow conditions and in some cases have superior infrastructure and amenities. Canmore, Kananaskis and Sunshine Meadows are three facilities that stand in between the Columbia area and the valuable Calgary market. Well-developed downhill and resort infrastructure further down the Columbia Valley in Invermere and Radium is also a strong source of competition.
Demand	▪ Long-term participation trends have been holding steady, but for communities with sound investments in infrastructure and services, business has been increasing.
Development Factors	• The most significant constraints to the development of a commercially viable nordic skiing centre are related to socio-economic factors rather than the physical characteristics of the landscape. Given adequate financial resources, the landscape can be modified as necessary to accommodate the required terrain characteristics for a quality nordic skiing centre. Other socio-economic factors of concern include the proximity to urban centres with adequate population base to support a nordic centre, the quality of the amenities and services provided at the nordic centre, marketing, etc. ▪ Tenure and resource management issues will have less of an impact on cross-country skiing than most other outdoor pursuits as it is assumed than most development will occur in the frontcountry near town centres. Any development of a nordic centre may require access to tenure to justify the economic costs of development (if development were to occur on Crown land). This way, non-compatible activities can be controlled and restricted. Given that a nordic centre should be located within a reasonable distance of its market (usually nearby town) the cost and availability of land may be a major issue (e.g. if private lands need to be purchased).

	▪ Further development of this product would have positive socio-economic benefits. As a low impact, family-oriented activity there are few downsides to increasing participation and visitation levels. As with all other winter tourism activities, more growth could be absorbed by the hospitality and service sectors to enhance their own profitability.

Resource Analysis

Terrain / Location Factors	• Cross Country Canada standards (derived from the Federation Internationale de Ski (FIS) standards) that define the ideal landscape characteristics for a cross-country skiing centre. Slope is the primary consideration, as there needs to be quite specific proportions of flat and sloped terrain. The ideal is 1/3 flat, 1/3 downhill and 1/3 uphill – the latter on slopes that don't exceed 7 degrees. This variability of slopes should be captured within a relatively small geographic area (1000 hectares or less) so that trail loops can be created in increments (e.g. 5km, 10km, 15km). Overall relief should be less than 150 metres to avoid extreme climbs or long, steep descents. Attractive scenery, lakes, wildlife viewing opportunities etc.; all add equally to the capability and suitability of an area. • The cross-country ski trails complex ideally is within an approximate 30 minute drive for the accommodation centers of where the participants are staying. • Preferred settings are on east facing slopes thus keeping the snow on the ground latter into the spring.
Infrastructure Requirements	▪ There are major infrastructure requirements for cross-country skiing as access, parking, signage, rentals and hospitality services are all required. Some cross-country ski areas are being transformed into multi-use, winter playgrounds or resort areas.19 This is to have a broader market appeal including couples and families. Resorts such as Whistler have seen cross-country ski visitation grow at a faster rate than downhill visits through investments in facilities and services. ▪ Groomed trails with a warming hut and fee collection centre, ski patrol services, off-season trail maintenance program.
Environmental / Wildlife Issues	• Potential wildlife species affected might include ungulates in their winter ranges. • New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15] • Environmental issues faced by cross-country skiers include human waste management. • The small numbers of participants who move slowly on skis limits impacts on wildlife. Skiers should, nonetheless, refrain from approaching wildlife and causing them any distress. Facilities such as cabins should be located away from important wildlife areas.
Access or Land use Issues	• If the potential development site is not serviced within a reasonable distance from an existing road, the costs associated with road construction and maintenance may dramatically reduce the suitability of the area. • The Golden Recreation Access Plan will provide direction as to the type of

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[19] SkiTrax, p.29, December/Holiday 1999.

[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

	recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. • Use of logging roads for access may face conflict with active logging operations. • Use of or access over private land will require the permission of the private land owner. • Where activities occur within designated Forest Recreation Sites, they must comply with the recreation management objectives established by the Ministry of Forests for the site. • The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	• Access to tenured land would be required in order to justify the economic costs of developing a cross-country skiing centre. With tenured land, non-compatible activities can be controlled and restricted (i.e. snowmobile use of trails). Given that a cross-country skiing centre should be located within a reasonable distance of its market - usually nearby towns or urban centres - the cost and availability of land may be a major issue (e.g. if private lands needed to be purchased). • All commercial recreation activities occurring on provincial crown land require a tenure that is issued by the British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures[20]. • Commercial cross-country skiing activities occurring within National Parks require the acquisition of a Business License and compliance with National Park regulations[21]. • Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these forest licensees. • All commercial activities that occur on provincial crown land require appropriate liability insurance coverage.
Capacity or Conflict Issues	▪ Mechanized vehicles (snowmobiles, ATV's) are not compatible with developed track-set cross-country ski trails.

5.3.3.3 Overall Potential

The overall potential for this product is very good. By taking advantage of existing groomed trails and infrastructures development can be facilitated. While natural features such as varied terrain are important, the built environment is critical – that means things like night lighting, parking, clear signage, high-quality and well-maintained equipment, transportation services and the availability of multi-activity packages can really broader the appeal.

Potential may be especially good in situations where existing downhill ski markets can be targeted. Both Revelstoke and Golden could cater to destination-oriented skiers (e.g. family skiers and couples). Families with children value good instruction for both the children and adults, activity areas specifically for younger participants, good ski rental facilities in terms of equipment quality and size selection and dining facilities catering to families. Couples will value not only the facilities and trails for the ski activity itself, but the overall ambience of the area, including dining and accommodation.

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[20] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[21] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations.*

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *Cross-Country Skiing* product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Please refer to **Appendix 3** for the detailed workshop results.

Cross-Country Skiing Product Ideas	
Revelstoke	**Golden**
▪ Rental / sales outlet* ▪ Events – races e.g. Lantern ski, biathlon* ▪ Combine XC / Snowshoeing ▪ Need additional "high elevation" skiing for more consistent conditions ▪ Courses / instruction e.g. racing school, family & group lessons* ▪ Lodge – with trails from lodge ▪ Develop flatter terrain	• Local nordic ski trail development based out of lodges and Bed and Breakfasts which might be linked to one another by a ski trail system* • Loppets / ski marathons and other special events • Development of a long distance nordic ski trail system*

5.3.3.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are three areas that have the highest opportunity values for the activity of cross-country skiing resulting from the preceding *Market Assessment and Resource Analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 3**).

Figure 3: Cross-Country Skiing Map

Revelstoke Area

There are three locations for track set cross-country skiing in the Revelstoke Area. These are: the Revelstoke Golf Course; the Mt. MacPherson Nordic ski area; and the Mt. Revelstoke ski trails including the lower portion of the Meadows in the Sky Parkway (the parkway is only track set for the annual Moonlight Ski event – the 2km and 5km loops are not track set). Mt. MacPherson receives the highest use as there are a greater variety of trails and it receives priority for track setting by the Revelstoke Nordic Ski Club. The season runs from December to April and all areas are used on a daily basis although weekend use is higher. Mt. MacPherson received approximately 3500 skier visits in 1999. The other two received approximately 1500 visits each. Ninety percent of use is by locals in all three areas. Ten percent comes from Alberta and other B.C. locations.

The Revelstoke area cross-country ski facilities are for the most part run by the local nordic ski club. This includes the track setting of the trails (with the exception of Mount Revelstoke which is track set by Parks Canada staff). To further promote and advance the local cross-country ski area as part of a destination experience, cross-country skiers expect daily grooming of trails. This may require augmenting the volunteer trail setting component with some paid staff. There are some minor issues with snowshoers and pets ruining the tracks.

Golden – West Bench

The Golden – West Bench area runs down the west side of the Columbia River from Donald in the north, to Canyon Creek in the south. The west boundary is the old railway grade, and the east boundary the river. This area has excellent topography for cross- country skiing: low undulating terrain with flat sections. Within this area, there are two existing cross country ski trail networks: Dawn Mountain which is maintained by the local nordic club (half of the trail network is on crown land, and half within the area under control by Kicking Horse Resort), and the old Moonraker trail network that has not been maintained for a number of years. The entire West bench area has excellent opportunities for linkages with the Kicking Horse Resort and town of Golden. With the exception of Kicking Horse Resort, the area does not have any commercial recreation tenures and is generally not populated except for Alpine Meadows Lodge.

Some of the constraints within this area include competing recreational use pressures from motorized activities (summer and winter), and important areas of winter ungulate range (elk and deer).

Golden – Lower Blaeberry (Willowbank / North Bench)

The Golden – Lower Blaeberry area runs down the east side of the Columbia River from Waitabit Creek in the north, to Hospital Creek in the south. The west boundary is the river, and the 1000-meter contour line is the approximate east boundary. This area also has excellent terrain features with limited conflicts. The major issue for the development of cross-country ski opportunities in this area is that most of the land is privately held. Many existing Bed and Breakfasts and lodges operate out of this area with their own small trail developments. A cooperative effort will be required to link public and private land and trail networks together.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Cross-country Skiing Issues	**Revelstoke Area**	**WestBench Golden**	**Blaeberry Golden**
Infrastructure needs	✓	✓	✓
Environmental / Wildlife	✓	✓	✓
Access / Land Use	✓	✓	✓
Tenure / Legal		✓	✓
Capacity / Conflicts		✓	

Mountain Biking

5.3.4 Mountain Biking

5.3.4.1 Activity Description

This activity involves the use of mountain bikes for riding along secondary roads, gravel roads, trails and pathways. Mountain biking often takes riders over rough and technical terrain, sometimes at high speeds. Long distances are often covered, leading riders into remote areas. Mountain bikes have become highly engineered species of technology. There are now mountain bikes that are specially designed for cross country, down hill, and uphill riding. Like all activities that take place in the untamed outdoors, mountain biking can be hazardous. Typically, the skill level of a mountain bike rider is much greater than that of a recreational road bike rider.

5.3.4.2 Market and Resource Analysis

Demographics

The age demographic for mountain biking is young (approximately two-thirds less than 40 years of age) with about equal portions of males and females. Participants usually travel either with friends or as couples - families with children have a very small share of this market. For Canada as a whole, more than 83% of all visitors participating in biking are Canadian. The international market is small at this time, as this is not a prime activity among the adventure market. In BC, the latest visitor data suggests a different pattern: biking has a fair degree of popularity among non-residents as an outdoor activity, with a participation rate of 26%. Many of these non-residents are believed to be US visitors.[22] Canadians outside BC have a participation rate of 35%. Both of these rates are higher than BC resident visitors, who have a participation rate of 17%.[23]

Most businesses involved in bicycle ventures in British Columbia are associated with multi-day frontcountry road touring. In the US, while overall bicycling participation has been fairly static, there has been significant growth in bicycling touring vacations (82% between 1989 and 1994). The share of the total biking market held by mountain biking is small compared to bicycle touring.

There are few guided mountain biking businesses in British Columbia, and the guiding side of mountain biking is in its infancy. This stems from the fact that most mountain biking participants prefer to cycle independently. The activity is more strenuous, requires more fitness, usually requires more specialized equipment and has an added element of danger that limit its overall market appeal. Yet its popularity keeps expanding. As mountain bikers age, go further afield for new experiences, and are able to penetrate deeper into the backcountry, the demand for a guided experience can be expected to increase. There will be more demand for guided mountain biking experiences in the mid to longer term.

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[22] Among non-resident visitors to Canada in 1995, US visitors had by far the highest participation rate for bicycling at 15%. No European market was above 3%. [*Adventure Travel in Canada: An Overview of Product, Market and Business Potential*, Tourism Canada, 1995]

[23] *BC Visitor Study Report on Travel in British Columbia*, Tourism BC, 1997.

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers : 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

The **challenge seeker** prefers cycling that is physically and/or technically demanding. For mountain biking, this may involve rides with extended uphill routes and technical single track with obstacles such as roots and rocks. For cycle touring, this involves steep climbs and long distances. The challenge seeker is likely to own or rent a high-end bicycle. The **experience seeker** looks for cycling on wider, easier roads with relatively flat terrain. Of more importance is the ability to learn and explore the surrounding area, particularly the natural and cultural features. Distances travelled are likely to be shorter with longer stops for sightseeing.

The **credit-card tourist**[24] is more willing to pay for convenience and upscale accommodation, food and guided service. Rather than having to plan extensively beforehand, these tourists rely heavily on a tour operator to plan the itinerary or they simply make decisions en route. The expectation (or hope) is that all stops and destinations will have the amenities for which the tourist is looking. The **self-contained tourist** prefers to be self-supporting, and relies much less on expenditures after the trip has started. For cycle touring, they will carry most of what they need using panniers, but for larger, more extended trips, they may use a support vehicle.

Market Assessment

Target Markets	▪ Short-haul and long-haul markets from US and Canada. ▪ The lack of destination status and facilities for either touring or mountain biking limits the potential across all markets, although there is ample resource potential for expansion.

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[24] REI Website, www.rei.com.

Competition	• Competition is intense for the both the touring and mountain biking participant, regionally and provincially. The Columbia District does not have a reputation as a touring destination such as is found on the Gulf Islands and southern Vancouver Island. There, island communities, the lack of high speed through-traffic and dispersed hospitality amenities, cultural features and artist networks provide an excellent backdrop for product development. • Competition is also stiff for the mountain biking visitor. Squamish and Whistler are considered by enthusiasts to be among the premier mountain biking destinations for extreme free-riding. Facilities are well developed in many places around the province. The BC Mountain Bike Directory[25] lists over 250 trails, three of which are in Golden and two in Revelstoke. In Canada, there are no comparable areas to the US mecca of mountain biking, Moab, Utah. • It is fairly easy to respond to any rising demand for biking because the business is not capital intensive and services can easily be an add-on feature for existing operators who might be offering other products (providing operators have access to trails).
Demand	• BC is growing in popularity as a mountain biking destination and demand will continue to rise. Multi-activity packages and tours will be necessary for attracting more touring visitors. Technological change is also impacting this market, most noticeably in the off-road/mountain biking category. Improved frame design and the introduction of front and rear shock-absorber technologies have allowed mountain bikers to penetrate deeper into the backcountry and to enter areas that were previously considered un-rideable.
Development Factors	• Mountain biking relies upon existing trail and road networks, while touring requires safe road networks linking interesting features both natural and built. Operators in more remote areas will require campgrounds and other accommodation facilities to encourage increased visitation and multi-day trips. Bike rentals, instruction and related services would also benefit improve competitiveness. • It is not economically feasible to develop new roads and trails exclusively for commercial mountain biking, so it will be important for the activity to coexist with other resource and recreation uses. Resource use conflicts can be a problem, especially if off-road mountain bikers compete with other trail users and motorized vehicles. In high utilization areas like North Vancouver, there has been a very concerted effort to physically separate hiking and biking trail networks. The Bureau of Land Management in the US and the US Forest Service (the two major managers of public land in the US) are also attempting to manage mountain bike activity to minimize conflicts. • Mountain biking, and to a lesser extent bike touring, has a reputation in some communities as a low value, low economic impact activity. Apart from the fact that this reputation is undeserved, it also overlooks the potential biking has for enhancing the overall visitor experience. Biking is one of the most popular outdoor activities in North America and that should be factored into a community's tourism strategy. Although bicyclists may not be high spending visitors, the client base is huge, with the potential for significant economic benefits.

Resource Analysis

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[25] http://www.mtb.bc.ca/trails/

Terrain / Location Factors	- Mountain biking requires road access to trailhead, areas for parking of vehicles, and a rideable trail or roadway. - A variety of terrain ranging for flats to up hills and down hills is required. This ratio of each will vary depending upon the market segment and their objectives. Generally speaking Challenge Seekers are looking for more radical terrain features, and Experience Seekers less radical terrain. - Depending upon the market segment, grater or lesser degrees of trail/road infrastructure is required. The Challenge Seekers are looking for less structures that lessen the difficulty of the ride, versus Experience Seekers and the other segments which appreciate trail enhancements such as bridges, switchbacks, clearing of trail tread of debris, etc.
Infrastructure Requirements	- The activity requires the use of roads, trails and pathways for riding. Most often, existing road or trail infrastructure is used for riding. Often trails that were designed for hiking or horse use are now popular mountain bike rides. - Additional secondary features such as vistas, alpine lakes, wildflowers, historical / cultural features and to the value and enhance of a mountain bike ride.
Environmental / Wildlife Issues	- Mountain bikes can have a substantial impact upon trail erosion due to the impact of the tire tread on the ground surface. Removal of organic layers to mineral soils can result from poorly designed trails or improper trail riding techniques. 26 - Mountain bikers can quickly and quietly come upon wildlife while trail or road riding. Depending upon the animal encountered, this can pose serious danger to both rider and animal alike. There have been several incidents of mountain bikers having encountered black and grizzly bears unexpectedly and resulting in a negative interactions.27 - Potential wildlife species affected might include elk, deer, moose, mountain goats and sheep, black and grizzly bears, and small mammals. - New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15] - Environmental issues faced by mountain bikers can include human waste management; trail erosion, and wildlife disturbances.
Access or Land Use Issues	- The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. - Use of logging roads for access may face conflict with active logging operations. - Use of or access over private land will require the permission of the private landowner. - Where activities occur within designated Forest Recreation Sites, they must comply with the recreation management objectives established by the Ministry of Forests for the site. - The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the

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[26] D.Eastcott& G. Lepp, *Backcountry Riding in the Canadian Rockies, RMB, Calgary, 1993..*

[27] Personal communications, ParkWardens and Rangers, Parks Canada and BC Parks.

[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

	land base.
Tenure or Legal Issues	▪ All commercial recreation activities occurring on provincial crown land require a tenure that is issued by the British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures[28]. ▪ Commercial mountain biking activities occurring within National Parks require the acquisition of a Business License and compliance with National Park regulations[29]. ▪ Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these forest licensees. ▪ All commercial activities that occur on provincial crown land require appropriate liability insurance coverage.
Capacity or Conflict Issues	▪ Some trails in national and provincial parks have been designated closed to mountain bikes. ▪ There can be conflicts with other trail users including hikers and horseback riders. These can be avoided and or mitigated with separation of differing trail users, trail routing, one-way directional flows and various other management techniques. ▪ Mountain bikers following the Rules of the Trail as stipulated by the International Mountain Bicycling Association.[30]

5.3.4.3 Overall Potential

The potential is good for this product in the Columbia. Mountain biking and tour operators will need to collaborate with the local accommodation industry and other tourism providers to support their product. Packaging with other guided activities will extend the reach to soft adventurers. Developing commercial ventures in the study area will be a real challenge because it is often convenient to engage in unguided activities. With an extensive network of maps, guides and on-line resources, most visitors can gain a thorough understanding of biking options on the Internet. The key will be providing convenient support services (shuttling, rentals, repair, accommodation, meals, interpretation) to convert these participants to buyers of a value-added product.

Downhill ski areas could diversify to accommodate mountain biking during the summer season. A mix of purpose-built biking trails (gnarly trails with more obstacles) to attract extreme enthusiasts and family-oriented trails to encourage extended stays and spending in the area could be developed.

Potential Business Opportunities

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[28] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[29] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations.*

[30] IMBA, Route 2, Box 303, Bishop, California 93514, USA.

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *Mountain Biking* product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Please refer to **Appendix 3** for the detailed workshop results.

Mountain Biking Product Ideas	
Revelstoke	**Golden**

▪ Downhill trails – technical terrain complex
▪ Events – races
▪ Camp / instruction
▪ Overnight and multi-day tours
▪ Heli-mountain biking
▪ Hot spring tours
▪ Full spectrum mountain bike company*
▪ Tie-in to kayaking and other activities
▪ Guidebook with GPS info and good photos
▪ Rentals / Lodge
	• Mountain bike shuttle with food service*
	• Mountain bike and road riding tours, with additional services of
	  o bike rentals
	  o Provision of maps, guide books, etc*
	• Marketing, promotion and hosting of races, competitions, eco-challenge and other special events
	• Heli-mountain biking

5.3.4.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are **four** areas that have the highest opportunity values for the activity of Mountain Biking resulting from the preceding *Market Assessment* and *Resource Analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 4**).

Figure 4: Mountain Biking Map

Revelstoke Area (Mt. MacPherson – Mt. MacKenzie)

The Revelstoke Area includes the extensive trail network at Mount MacPherson and the adjoining Begbie Falls area, the new trail complex that is being developed on the lower slopes of Mount Mackenzie, and the Airport Flats south of Revelstoke during low water. The MacPherson / Begbie area is the most heavily used and developed area and is the site an annual mountain bike race. New technical mountain bikes trails have been developed on the lower slopes of Mount Mackenzie in recent years, including a downhill course. The Airport Flats is a picturesque novice riding area that is only available for riding in the spring /early summer, and late fall due to the water fluctuations of Upper Arrow Lake.

This area is one of the most heavily used recreation areas in the forest district. It's proximity to Revelstoke and attractiveness for a variety of activities makes it extremely popular. In the summer, hikers, heli-hikers, ATV'ers, mountaineers, rock climbers, mountain-bikers and horseback riders use the area. Both private users and commercial operators use this area extensively. Conflicting and overlapping use is inevitable considering the sheer number of activities and growing volume of users.

Keystone / Standard Basin

Keystone-Standard Basin, located approximately 50 km north of Revelstoke on the east side of Lake Revelstoke, is recognized as one of the premier mountain bike rides in British Columbia due to its scenic alpine vistas, wildflowers and topography. The area is a designated BC Forest Service Recreation Site due to its high recreation values for a number of activities. The area is accessible by a logging road with the trailhead situated high up the mountainside in the sub-alpine. An existing 18 km trail winds its way along alpine meadows and ridges to a backcountry cabin. The trail is suitable for intermediate to advanced riders.

Keystone-Standard Basin is heavily used for recreation in both winter and summer. In the winter snowmobiling is the heaviest use, with occasional ski touring and snowshoeing. The area is also within a heli-skiing tenure. In the summer, the area is also used extensively for berry picking and hiking, with some ATV'ing and horseback riding also occurring. Each user group has its own expectations in terms of visitor experience. These expectations have the potential to create challenging differences of opinion as to how the land base should be utilized.

Golden – West Bench

The Golden – West Bench includes the area west of Golden, north to Donald and south to the Forest District boundary. The topography of the area has good undulating terrain suitable for all skill levels of mountain biking. It includes the existing trail networks at Moonraker and Dawn Mountain. The area has great potential for the development of new trails, and to develop trail linkages with Kicking Horse Resort and the Town of Golden. Many old logging roads are found throughout the area.

The Golden – West Bench area does not have any major environmental, wildlife of visitor use issues or conflicts.

Mount Seven

The Mount Seven area has already in a short time, become well known and popular for its technical 6,000 vertical foot mountain bike downhill decent. The area is located immediately southeast of Golden and can be accessed by a two wheel drive road to the top of the mountain. Volunteers who are members of a local mountain bike club maintain the existing mountain bike trail network. The BC Forest Service is in the process of installing some recreational feature infrastructure to accommodate the rapid increase in use of the area. Mount Seven is the site of a well-known mountain bike downhill decent race. The popularity and participation of the event has tripled over the last couple of years. The area also has suitable terrain for intermediate riders. The Mount Seven area does not have any existing commercial recreation tenures.

Blaeberry

The Blaeberry Valley north of Golden is also a well-known mountain biking area. There are numerous old hiking and horse packing trails that are now also being used for mountain biking. These trails include Redburn Creek, Blaeberry Creek, Ensign Creek, Collie Creek, and Amiskwi River. As with the other recreation activities that are currently occurring throughout the Blaeberry, cooperative initiatives will be required to minimize conflicts between the differing recreational user groups and residents, and to maximize the opportunities for continued use of the area.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Mountain Biking Issues	Revelstoke Area	Keystone-Standard Basin	Golden-West Bench	Mount Seven	Blaeberry
Infrastructure Needs			✓		
Environmental / Wildlife	✓	✓	✓	✓	✓
Access / Land Use		✓		✓	✓
Tenure / Legal	✓	✓	✓	✓	✓
Capacity / Conflicts	✓	✓			✓

Mountaineering

5.3.5 Mountaineering

5.3.5.1 Activity Description

Mountaineering involves the ascent of mountains and peaks, and/or the traverse of mountainous terrain with the aid of technical climbing gear and specialized equipment. Due to its attendant hazards, mountaineering is normally only undertaken by experienced mountaineers or with the leadership and aid of an experienced guide. This can be undertaken as a day activity, but is often a multi-day excursion involving lengthy approaches and operating from remote base camps.

5.3.5.2 Market and Resource Analysis

Demographics

In this report, rock climbing and mountaineering are being analyzed and mapped as separate activities. However, the available market research does not always distinguish between the two and even when it does, the statistics are not always discretely presented.

The most recent data available on commercial recreation clients has lumped mountaineering and rock climbing as a single market. Canadian commercial operators have found that participants in these activities are generally younger males (approximately two thirds are males younger than 34), mostly from Canada (84%) and the US (12.7%), and travelling solo. By and large, this is not a family-oriented or group activity.[31]

The US data reflects the Canadian experience. Fully one third of all participants are between the age of 16 and 24.[32] Traditional rock climbing tends to be more popular than alpine mountaineering, which attracts 45% of all participants to this sport.[33] Alpine mountaineering and other forms of climbing are not mutually exclusive recreation categories. Many activities overlap and participants will regularly undertake more than one activity on a trip.

Market Segments

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[31] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[32] Human Powered Outdoor Recreation, State of the Industry Report, Outdoor Recreation Council of America, 1997.

[33] ORCA Outdoor Industry Distribution Study, Leisure Trends Group, 1997.

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers : 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

The **enthusiast** has been defined as the most active one-third participants by number of times they participate in the activity. By this definition, they are more likely to provide opportunities for repeat business for tour operators, but at the same time, more experienced enthusiasts are more inclined to set out on their own. If using a guide, they will look for technical instruction and the experience and ability to make difficult, well-informed decisions. Enthusiasts also go on longer trips – while they number approximately one-third of participants, they account for 74 percent of days spent mountaineering[34]

Participants, on the other hand, are looking to focus on the physical and mental challenge, as opposed to develop technical expertise in areas such as knot-tying. Participants are using guides as a way of gaining access to an activity they do not conceive of being able to do on their own. They are looking for the guide to ensure their safety and reduce the risk of the activity and the need to go through a steep learning curve to perform the activity. In many cases, participants see this activity as a one-time experience, although sometimes the enjoyment of the experience may result in participants looking to become enthusiasts. Participants generally do not do as much research before arriving at the destination, relying instead on the operator to have this information readily available.

The **soft adventurist** is looking to enjoy the remote, alpine environment without undue hardship or risk. They are generally older (baby boomers), who are willing to pay for comfortable lodging and other amenities, while getting the feeling of personal challenge through an activity in the mountains.

Hard adventure travellers desire a natural, less-catered experience which includes less comfortable shelter such as tents and less dependence on mechanical support. These participants are generally younger, outdoors enthusiasts.[35]

Risk seekers participate in mountaineering and climbing as a way to encounter situations where there is significant uncertainty bringing about the potential for danger or failure. A much more significant and saleable market segment from a tourism perspective is the **insight seeker**. These individuals look for personal insight or enlightenment from a challenging experience that has risk as an inevitable by-product. The desire is to minimize the exposure to risk, while maximizing the challenge for themselves.

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[34] Human Powered Outdoor Recreation, State of the Industry Report, Outdoor Recreation Council of America, 1997.

[35] The Sea to Sky CBR Opportunities Study, p.46.

Market Assessment

Target Markets	▪ Participants and soft adventurers and among North American short haul and long haul markets.
Competition	▪ Because the market for mountaineering is so small, it takes a significant push to attract enthusiasts. Many other areas right around the world have much more advanced infrastructure, products and marketing programs geared toward demanding mountaineerers and climbers.
Demand	▪ The demand for mountaineering is relatively low and derives from a highly specialized market. It is regarded as a high-risk activity and this will restrict its appeal to the "hard" outdoor adventure market.
Development Factors	▪ Mountaineers and climbers value unspoiled, unpolluted and uncrowded mountain wilderness, which explains the concentration of activity in the national and provincial park system. ▪ Commercial operators require access to the high alpine in the summer where conflicts with the forest industry and other recreation users will be at a minimum. The identification and use of preferred sites on a regular basis will require CBR tenure. In order to assure a quality trip experience, operators may require several locations so they can react to constantly changing weather and safety conditions. ▪ Because of the risk inherent in the sport, commercial operators must emphasize safety and being able to gauge ability and energy level of each customer. This means hiring experienced guides/instructors with certification in mountaineering, first aid, medical and leadership training, selecting routes appropriate for customers that provide challenge without undue risk and establishing rules and procedures for behaviour and decision-making during the trip.

Resource Analysis

Terrain / Location Factors	▪ Mountaineering requires access to alpine terrain and high peaks that provide opportunities to "summit" (a common motivation for this activity). Often, the higher peaks and more challenging terrain are deemed to be preferable. Direct access is not as big a factor as with many other activities, because remoteness and challenge are part of the attraction for this activity.
Infrastructure Requirements	▪ This activity requires a lot of technical (and expensive) equipment. Personal gear is usually supplied by the participants, but tents, cooking gear, food and safety equipment are the responsibility of the operator or guide . ▪ Self-contained camps are common, but a well-located alpine or sub-alpine hut is a definite advantage for expeditions. Base operations with proximity to transportation (helicopter or vehicle) are also required. ▪ Accommodation and food services are often necessary at the beginning and end of trips. ▪ Qualified guides and instructors are prerequisite for commercial

	participation in this activity. - A climbing gym or easily accessible climbing area for training and instructions is a definite advantage.
Environmental / Wildlife Issues	- Wildlife Issues include potential interactions with several wildlife species. Bears can be a particular concern in remote camps if food is not properly handled. - New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15] - Trail closures due to possible wildlife encounters often occur in National Parks. Awareness of temporary regulations as well as operator/guide codes of ethics is required.
Access or Land use Issues	- The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. - Use of or access over private land will require the permission of the private landowner. - Use of logging roads for access may face conflict with active logging operations. - Where activities occur within provincial Forest Recreation Sites, they must comply with the recreation management objectives established by MoF for the site. - The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	- All commercial recreation activities occurring on provincial crown land require a tenure that is issued by British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures36. - Commercial mountaineering activities occurring within National Parks require the acquisition of a Business License and compliance with National Park regulations37. - Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these licensees. - Commercial activities taking place on Crown Land require appropriate liability insurance coverage.
Capacity or Conflict Issues	- Possible conflicts can occur with public users of alpine huts and cabins. - Capacity is not usually a concern, although popular alpine routes like the NW ridge of Mt. Sir Donald can be very busy during periods of good weather.

5.3.5.3 Overall Potential

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[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

[36] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[37] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations.*

Despite its ample alpine terrain, BC has not developed its full potential as a mountaineering destination and the Columbia District, while its natural resources may favour development, has modest potential because of its current lack of developed mountaineering products.

The association with the Canadian Rockies and the National and Provincial park system, and the fact that the area has long been associated with the "Canadian Alps" all enhance the marketability of the mountaineering product in the Columbia.

The hut product is closely associated with the development of multi-day products. Huts are the major alternative to camping and are a familiar accompaniment among European participants. The majority of the hut system in the Rockies is run by the Alpine Club of Canada (ACC) or by BC Parks. As most of these are let for a nominal charge, there is little inducement among the enthusiast contingent for guided services. Similar to other products assessed in this report, the best commercial potential is in increasing the appeal of this product to participants in the soft adventure market.

Mountaineering has been made more accessible through the use of helicopters, snowmobiles and glacier ski planes. Operators can appeal to the softer adventure market by using motorized transportation and superior accommodation facilities to offset trip durations and safety concerns. This is what heli-ski operators have done to create summer capacity for their facilities. In catering to the soft adventure participant and emphasizing the comforts of lodges and gourmet meals, clients are given the opportunity to "experience" the mountains and the thrill of summiting, without having to learn the hard, technical skills of mountaineering and climbing.

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *mountaineering & rockclimbing* product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Please refer to **Appendix 3** for the detailed workshop results.

Mountaineering & Rockclimbing Product Ideas

Revelstoke	Golden
▪ Mountain Guide Company and mountaineering school* o offer different levels of programs o branch out to bigger mountains o history of mountaineering in Revelstoke ▪ Heli-mountaineering o Families o High-end destination market ▪ Commercial Climbing Wall	• Mountaineering and rock climbing schools and courses* • Outdoor activity school • Small retail outlet* • Climbing gym • Hostel / accommodation / food services • Guided trips* • Guide books • Joint marketing and promotion of mountaineering and rock climbing businesses with other tourism businesses

5.3.5.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are 5 areas that have the highest opportunity values for the activity of Mountaineering, resulting from the preceding *market assessment* and *resource analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 5**). It should be noted that it is extremely difficult to differentiate areas in the Columbia District for mountaineering as the entire district affords at least some potential for this activity. The areas identified below are thought to be the best when combining all factors, but other areas within the district may also have considerable merit.

Figure 5: Mountaineering Map

Rogers Pass – Glacier National Park

This famed district is one of the great classic areas of North American alpinism. It offers fine climbs on rock, snow and ice at all standards of difficulty, with a great deal, in particular, for the intermediate mountaineer.[38] Major A.J. Rogers who was looking for a pass through the mountains as a route for the Canadian Pacific Railway discovered Rogers Pass in 1881. In 1886 Glacier National Park was established and the area become renowned for its mountaineering with the coming of the Swiss Guides and the construction of Glacier House – a 90 room hotel built by CP Rail to house tourists and mountaineers as their base for attempts on the uncharted peaks of the Selkirk Range. Mt. Sir Donald (3297 m) is considered to be one of the 50 classic climbs of North America. Other notable peaks include Mt. Häsler (3399 m), Mt. Wheeler (3386 m), Mt. Rogers (3214 m), Swiss Peak (3208), Mt. Tupper, (2816 m), Hermit Mountain (3110 m), Mount MacDonald (2893 m), and Mt. Bonney (3107 m). Since this area is within a national park, particular attention should be paid to park regulations concerning wildlife and environmentally sensitive conduct in the backcountry.

Gold Range – Monashee Mountains

The Gold Range is an attractive extended ridge of high peaks in the southern Monashee Mountains on the west side of Upper Arrow Lake (reservoir) of the Columbia River. Here, are mountaineering challenges for all levels. Mt. MacPherson at the extreme north end of the range near Revelstoke, can be summited by and extended hike without technical difficulty. Mt. Begbie, immediately adjacent, is also a favourite hike with locals, although some glacier travel and climbing (4th class) is required. At the south end of the range, Mt. Thor and Mt. Odin present more technical requirements and are more suitable for experienced mountaineers.

Adamants Range – Selkirk Mountains

The Adamant Range is located in the Northern Selkirk Mountains bounded by the "Big Bend" of the Columbia River. The term 'Adamants' is an expression used by climbers to refer to all peaks that are accessible from the Fairy Meadow or Great Cairn huts, typically the base of climbing in the area. This includes Mt. Sir Sanford Range to the south and the Gothic Range to the east. The Adamants combine superb rock climbing, challenging glacier approaches, and excellent snow and ice routes to provide mountaineering with a distinctly alpine feel. Replete with magnificent peaks and spires, the Adamant Range (and the adjacent Gothics) are the mini-Chamonix of the Columbias[39]. Mt. Sir Sanford is highest mountain in the Selkirk Mountains at 3522 metres. Several other excellent mountaineering objectives include Adamant Mountain (3356 m), Austerity Mountain (3350 m), Blackfriar's Peak (3260 m), Turret Mountain (3280 m) and the Stickle (3150 m).

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[38] The Columbia Mountains of Canada – Central, The American Alpine Club Climbers Guide, John Kevin Fox, Roger W. Laurilla, William L. Putnam, Earle R. Whipple. AAC Press, New York, 1992. p. 213.

Yoho National Park

Yoho National Park has some excellent mountaineering terrain. The Lake O'Hara area is synonymous with the foundation of Canadian Alpinism in the Canadian Rockies.....the astounding beauty of the area, plus the accessibility of a large number of varied climbs promoted its popularity which continues today.[40] In the early 1900's the Alpine Club held camps here and many of the first ascents where made during this period. Notable peaks include Mt. Biddle (3319 m), Mt. Hungabee (3492 m), Mt. Schaefer (2692 m), Odaray Mountain (3159 m) and Mt. Huber (3368 m). The fully equipped Elizabeth Parker Hut (capacity 24 in two huts) located in an alpine meadow west of Lake O'Hara can provide a base of operations if required.

The Field area also has a number of good mountaineering objectives, with access directly from the Trans Canada Highway. Mt. Stephen (3199 m) is the most obvious example. The Goodsirs in nearby Kootenay National Park are also favourite climbs in this area because of their height (North Goodsir 3562 m, South Goodsir 3525 m). The Stanley Mitchell hut in an alpine meadow near the head of Little Yoho valley is a possible base for climbing the President (3138 m) and Vice President (3038 m). It is a fully equipped cabin with a custodian in summer with a capacity of up to 30 people.

Mt. Clemenceau Area

The mountains of the Clemenceau Icefield are very remote. For those people looking for a true get-away experience, this may be the answer. The approach is challenging. It requires a three or four day "expedition-style" walk-in with lots of wading and "bush-whacking". An alternative often selected is by air, since the area is not in a national park, and more time can be allocated to the task at hand, i.e. climbing peaks. There are a large number of excellent moderate mountaineering routes.[41] The Clemenceau area is predominantly glacier, and requires advanced to expert skills to safely navigate the area. The Alpine Club of Canada built the Lawrence Grassi hut on the west side of the area in 1981. It is an awkward location for climbs on the east side, and camps or bivouacs may be preferred. The hut can accommodate up to 20 people.

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[39] The Columbia Mountains of Canada – Central, The American Alpine Club Climbers Guide, John Kevin Fox, Roger W. Laurilla, William L. Putnam, Earle R. Whipple. AAC Press, New York, 1992. p. 92.

[40] Selected Alpine Climbs in the Canadian Rockies, Sean Dougherty, Rocky Mountain Books, Calgary, Revised 1999, p.136

[41] Selected Alpine Climbs in the Canadian Rockies, Sean Dougherty, Rocky Mountain Books, Calgary, Revised 1999, p.226.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Mountaineering Issues	**Rogers Pass**	**Gold Range**	**Adamants Range**	**Yoho National Park**	**Mt. Clemenceau Area**
Infrastructure Needs		✓			
Env't/Wildlife	✓	✓	✓	✓	✓
Access/Land Use		✓			✓
Tenure/Legal	✓	✓	✓	✓	✓
Capacity/Conflicts	✓			✓	

Rockclimbing

5.3.6 Rockclimbing

5.3.6.1 Activity Description

Rockclimbing is the activity of climbing on steep rock walls, faces and bluffs using technical climbing gear such as ropes, harnesses, carabiners, camming units, etc. This is principally an outdoor activity, but increasingly, indoor climbing gyms are becoming popular where practitioners can learn or improve their skills in a controlled environment.

5.3.6.2 Market and Resource Analysis

Demographics

A recent study of Canadian outdoor adventure markets showed rockclimbers to have the following characteristics[42]:

- Younger, with 67.1% being 34 and under.
- Predominantly male (63.1%).
- Travel solo (78.0%).
- From Canada (84.0%).
- From the US (12.7%).[43]

In a 1997 study in the US[44], the largest age group segment in the mountaineering and rockclimbing category was 16 to 24 year olds, with nearly one-third of all participants.

A 1997 US survey[45] ranked the participation rates of climbers in various types of climbing/mountaineering. These do not add up to 100 percent since climbers often participate in more than one type of climbing activity.

Activity	Percent of total participants
Traditional rockclimbing	84
Indoor climbing	71
Sport climbing	58
Alpine mountaineering	45
Ice climbing	28

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[42] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[43] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.48, 1995.

[44] Human Powered Outdoor Recreation, State of the Industry Report, Outdoor Recreation Council of America, 1997.

[45] ORCA Outdoor Industry Distribution Study, Leisure Trends Group, 1997.

Generally, those activities that are more accessible, both in terms of location and cost, and subject to less risk, are the more popular. Alpine mountaineering and ice climbing require more expensive equipment, travel to remote areas and good weather conditions. They also present more risk and consequently have lower participation rates.

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers : 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

The **enthusiast** has been defined as the most active one-third participants by number of times they participate in the activity. By this definition, they are more likely to provide opportunities for repeat business for tour operators, but at the same time, more experienced enthusiasts are more inclined to set out on their own. If using a guide, they will look for technical instruction and the experience and ability to make difficult, well-informed decisions. **Enthusiasts** also go on longer trips – while they number approximately one-third of participants, they account for 78 percent of days rock climbing.[46]

Participants, on the other hand, are looking to focus on the physical and mental challenge, as opposed to develop technical expertise in areas such as knot-tying. Participants are using guides as a way of gaining access to an activity they do not conceive of being able to do on their own. They are looking for the guide to ensure their safety and reduce the risk of the activity and the need to go through a steep learning curve to perform the activity. In many cases, participants see this activity as a one-time experience, although sometimes the enjoyment of the experience may result in participants looking to become enthusiasts. Participants generally do not do as much research before arriving at the destination, relying instead on the operator to have this information readily available.

The **soft adventurist** is looking to enjoy the remote, alpine environment without undue hardship or risk. They are generally older (baby boomers), who are willing to pay for comfortable lodging and other amenities, while getting the feeling of personal challenge through an activity in the mountains.

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[46] Human Powered Outdoor Recreation, State of the Industry Report, Outdoor Recreation Council of America, 1997.

Hard adventure travellers desire a natural, less-catered experience which includes less comfortable shelter such as tents and less dependence on mechanical support. These participants are generally younger, outdoors enthusiasts.[47]

Risk seekers participate in mountaineering and climbing as a way to encounter situations where there is significant uncertainty bringing about the potential for danger or failure. A much more significant and saleable market segment from a tourism perspective is the **insight seeker**. These individuals look for personal insight or enlightenment from a challenging experience that has risk as an inevitable by-product. The desire is to minimize the exposure to risk, while maximizing the challenge for themselves.

Market Assessment

Target Markets	▪ Participants and enthusiasts in short-haul and long-haul North American markets.
Competition	▪ There is extensive competition from well known international destinations such as the Alps, South America, the Pacific Northwest of North America and California for the climbing participant. Neither Canada nor BC have a significant share of the international or North American markets for climbing. Recent estimates of only 0.2% of the North American market for climbing shows just how far Canadian operators have to go in attracting more business. Even on a regional basis, the Columbia would have to be considered a secondary destination behind Alberta (Canmore, Kananaskis) and the Squamish and Skaha areas both of which draw from short-haul markets in the Pacific Northwest.
Demand	▪ Future demand will grow as technology improves and more soft adventurers enter the market. But there is also a growing "extreme" market for rock climbing.
Development Factors	▪ Rock climbing can be focused on relatively small activity areas where conflicts with other users are likely to be minimal. ▪ There has been a significant increase in the popularity of indoor climbing. In 1996, 71 percent of Climbing Magazine readers reported to be participating in indoor climbing.48 This will result in increasing popularity of sport climbing and bouldering. Operators in these activity areas will need to deal with overconfidence or lack of technical skill for those climbers moving from indoor to outdoor climbing. ▪ Because of the risk inherent in the sport, commercial operators must emphasize safety and being able to gauge ability and energy level of each customer. This means hiring experienced guides/instructors with certification in rockclimbing, first aid, medical and leadership training, selecting routes appropriate for customers that provide challenge without undue risk and establishing rules and procedures for behaviour and decision-making during the trip.

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[47] The Sea to Sky CBR Opportunities Study, p.46.

[48] Climbing Magazine Reader Survey, 1996.

Resource Analysis

Terrain / Location Factors	▪ Rockclimbing requires very specific terrain where (preferably) short approaches lead to near vertical, vertical, or overhanging rock faces that are at least 10 –15 metres high. Areas that provide multi-pitch (several rope lengths) opportunities have greater appeal, especially for more experienced climbers. The rock needs to be stable and provide a variety of climbing routes that vary in difficulty and interest for the climber. ▪ Rockclimbing areas that are in close proximity to communities or have easy access from major transportation routes have a definite advantage over remote areas in terms of attracting users.
Infrastructure Requirements	▪ Rockclimbing requires little in the way of infrastructure. Some benefits may be gained by having good access trails, and toilet facilities for the more heavily used areas. ▪ A survey of rockclimbing visitors in Squamish indicated that basic infrastructure were at the top of the list of climber needs. Improving washroom facilities, clean drinking water, garbage disposal, camping and shower facilities, parking, firewood, signage and visitor information were suggested as ways of improving the area.49 ▪ From a business perspective, it is necessary to have some base of operations, but it does not need to be elaborate. Transportation may be required to shuttle guests to and from the climbing sites. ▪ If an indoor climbing gym is contemplated, a high volume of clients is required to offset the major capital investment that is required. Small communities without a large "drop-in" crowd may have a challenge generating enough business.
Environmental / Wildlife Issues	▪ There are potential interactions with wildlife depending on the location of the climbing site. ▪ Human waste is an issue at some sites due to concentrated use. ▪ New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15]
Access or Land use Issues	▪ The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. ▪ Use of, or access over, private land will require the permission of the private landowner. ▪ Use of logging roads for access may face conflict with active logging operations. ▪ Where activities occur within provincial Forest Recreation Sites, they must comply with the recreation management objectives established by MoF for the site. ▪ Some climbing routes and areas are established and maintained by volunteers. Cooperative arrangements may be required to use the areas commercially.

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[49] Economic Impact of Rockclimbing and Windsurfing, Sea to Sky Economic Development Commission & Festivals BC, Summer 1992.

[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

	▪ The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	▪ All commercial recreation activities occurring on provincial crown land require a tenure that is issued by British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures50. ▪ Commercial activities occurring within National Parks require the acquisition of a Business License and compliance with National Park regulations51. ▪ Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these licensees. ▪ Commercial activities taking place on Crown Land require appropriate liability insurance coverage.
Capacity or Conflict Issues	▪ Popular local climbing areas such as Begbie Bluffs can get quite busy on weekends. While capacity is not generally and issue, the small parking lot can be full and the preferred or "classic" routes can often be busy. ▪ Conflicts with other users are not common as the terrain is quite specific to this activity. However, resource extraction (logging) nearby can be a visual and aesthetic deterrent to participants.

5.3.6.3 Overall Potential

While not exceptional, there is potential to expand the rock climbing product in the Columbia. Providing more teaching and instruction is one of the best ways to create more appeal for this product locally among participants and enthusiasts. A good model for development may be Yamnuska Inc., a mountaineering school and guiding service based in Canmore, Alberta. They provide beginner to advanced courses in mountaineering, rock and ice climbing. More advanced courses are also available.

One sub-market that has expanded rapidly in the US and Canada is that of corporate climbing. Organizations such as Venture Up have built a sizeable commercial business catering to large corporations which use climbing for team building and experiential learning.

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the

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[50] The provincial Land Act requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[51] Parks Canada, National Parks Act (1988) and *National Parks General Regulations*.

workshops. The following table lists the *mountaineering and rockclimbing* product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Some ideas were combined as the focus group felt that there was not adequate capacity in the "stand-alone" ideas to merit business development. Please refer to **Appendix 3** for the detailed workshop results.

Mountaineering & Rockclimbing Product Ideas	
Revelstoke	**Golden**
▪ Mountain Guide Company and mountaineering school* o offer different levels of programs o branch out to bigger mountains o history of mountaineering in Revelstoke ▪ Heli-mountaineering o Families o High-end destination market ▪ Commercial Climbing Wall	• Mountaineering and rock climbing schools and courses* • Outdoor activity school • Small retail outlet* • Climbing gym • Hostel / accommodation / food services • Guided trips* • Guide books • Joint marketing and promotion of mountaineering and rock climbing businesses with other tourism businesses

5.3.5.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are **four** small areas that have the highest opportunity values for the activity of rockclimbing, resulting from the preceding *market assessment* and *resource analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 6**).

Figure 6: Rockclimbing Map

The four small climbing areas are within a short (30 minutes or less) drive from Revelstoke. These areas are all immediately adjacent to paved highways and can be accessed quite easily for the purposes of rockclimbing.

The **Lauretta Slabs** are located 20 minutes east of Revelstoke in Mt. Revelstoke National Park. This is a small climbing area just above the highway #1 about 2 km west of the Skunk Cabbage picnic area. Parking is a challenge and must be accomplished by utilizing the shoulder of the highway on some dangerous curves. Four pitches of good slab climbing are available on both protected (bolted) and unprotected routes (use self placed protection). No signage or facilities are available.

Begbie Bluffs is by far the most "developed" climbing area in the district. It is located 9 km south of Revelstoke adjacent to Highway #23. The Ministry of Forests has developed a recreation site here with a network of trails, good signage and outhouse facilities. There are more than 100 developed climbing routes and a guidebook has been developed for the area. It is almost exclusively single pitch sport routes, but some are very challenging and attract advanced climbers. The solid rock and variety of routes makes climbing enjoyable for all abilities.

Shaketown and **Blanket Creek** are two small areas also immediately adjacent to Highway #23, 15 km and 25 km south of Revelstoke, respectively. These areas are generally more suitable for advanced climbers. There are perhaps only a dozen developed routes in these two areas and no facilities are available. However, services are available at Blanket Creek Provincial Park, which is located nearby.

Note: There is a sport climbing area south of Golden in the Spillimacheen River valley that is becoming quite developed with several routes for a variety of abilities. This area is outside of the study area, but close enough to Golden to be a destination for local climbers.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Rockclimbing Issues	Lauretta Slabs	Begbie Bluffs	Shaketown	Blanket Creek
Infrastructure Needs	✓		✓	✓
Env't/Wildlife	✓	✓	✓	✓
Access/Land Use			✓	
Tenure/Legal	✓	✓	✓	✓
Capacity/Conflicts				

Canoeing / Kayaking

5.3.7 Canoeing/kayaking

5.3.7.1 Activity Description

Canoeing and kayaking involves self-propelled (non-motorized) transportation around lakes and rivers, on a day-use basis, or multi-day trip. The skill level varies between novice for flat water paddling, to expert for maneuvering through technical white water rapids. It is suitable for a wide range of participants in both age and ability.

5.3.7.2 Market and Resource Analysis

Demographics

Canoeing and kayaking are two separate tourism products, which have been combined in this report because they share many of the same required resource attributes. Although many tourism operators offer services related to both activities, their market profiles are distinct and they should be viewed as separate activities.

Kayaking and canoeing generally require a good fitness level, and have their strongest appeal among younger travellers. Kayaking/canoeing operators frequently include bird watching and nature observation as secondary activities. Kayaking/canoeing can also play a secondary role as part of other travel experiences that involve wilderness activities.

In Canada, river kayakers tend to be younger than ocean kayakers, between 20 and 44 years of age. The majority (60%) are male, and travel with friends (29%) or couples (28%). Participants are from Canada (82%), the U.S. (12%) and overseas (6%). The demand for kayaking has increased over the past decade as access to better quality equipment and instruction makes it easier to learn and become proficient at the sport.

The canoeing market differs from the kayak market in some important ways. Although many demographic characteristics are similar (the average canoe participant is under the age of 35 (53%) and male (62%)), they are much more likely to travel with friends (48%), and perhaps of most significance to commercial operators, are just as likely to be international visitors than Canadians. In 1996, forty-five percent of commercially guided canoeists were Canadian, while 31% were German and 14% American.[52]

Although not conclusive, Canadian visitor data does suggest that the river kayak product appeals mostly to Canadian participants and secondarily Americans, while the canoe product has a much stronger appeal for the German and American markets. In terms of absolute size, the market for canoeing is much larger than kayaking. Participation rates for river kayaking are among the lowest of all outdoor recreation activities.

There is expected to be continued growth in the future for canoeing especially and, to a lesser extent, kayaking. Canoeing is part of the North American heritage and is relatively easy to learn. It is also a portable activity as participants can easily take their boats to any river that is accessible by vehicle. River kayaking is a more demanding activity requiring considerable skill and higher levels of risk. Consequently it will probably grow more slowly than canoeing.

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers : 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

Researchers use different ways to segment outdoor adventure markets, but two of the most popular are by participation level and travel motivation.

An **enthusiast** has been defined as a person who canoes or kayaks nine times or more in a year, whereas a **participant** is anyone else who participates at least once a year.[53] Enthusiasts usually have their own equipment and are motivated to visit an area based on its capabilities for hosting that activity. Participants are more likely to require equipment, gear and services when they participate and also tend to value secondary activities such as culture and scenery.

Activity-based decision-makers are made up mostly of enthusiasts seeking a riskier, hard adventure activity, with higher skill requirements. Most river kayakers fall into this category and will select their travel destination based on a prior decision to participate in the activity. It is uncommon for travellers to make a spontaneous decision to participate in demanding sports such as whitewater

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[52] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[53] "Outdoor Recreation Participation Study for the United States", Outdoor Recreation Coalition of America, December 1997.

kayaking after arriving at their destination. A growing sub-segment of this market is the sport of whitewater rodeo or playboating, which involves staying in one area of the river and performing a series of technical manoeuvres. The key criteria used by the activity-based decision-maker include the level of whitewater vis-à-vis the kayaker's skill level (Class IV and V for experts), and access to the river for put-ins and take-outs. Other factors include convenience of access and launch points, as well as safety and emergency provisions.

Destination-based decision-makers are motivated to visit a particular destination first and then decide whether or not to participate in canoeing or kayaking. This category also includes special groups such as schools and women's groups, who are looking for a "once-in-a-lifetime" experience. The participant segment is often seeking a trip that includes kayaking and canoeing only as a part of a broader, overall experience. Therefore, factors such as scenic beauty and unique cultural attributes will influence travel patterns.

Market Analysis

Target Markets	▪ Participants/soft adventurers from BC, short-haul markets (Canada and US) and overseas markets (Germany). ▪ Enthusiasts/hard adventurers (BC and Alberta residents).
Competition	▪ There is extensive competition regionally and across Canada for canoeing and kayaking. Alberta Rockies, Kootenays, Thompson Okanagan and the Caribou offer quality river/lake experiences, with similar features to the Columbia. One product that the study area cannot offer is the multi-day trip lake system linked by waterways and portages such as is available at Bowron Lakes. Wilderness river/lakes activities and new products such as voyageur canoeing are available in all provinces.
Demand	▪ Long-term trends show rising participation rates among North American markets, more so in the participant category, which consume softer adventures than the enthusiast market seeking a more extreme adventure.
Development Factors	▪ Infrastructure and access to related activities such as wildlife viewing is important. Attracting participants and enthusiasts will require the development of more amenities to encourage stopovers. ▪ More vertical integration of product design and marketing is required, including raising awareness of the potential of lakes and rivers among BC residents (i.e. enthusiasts who are activity-oriented travellers). ▪ Resource management has a significant impact on the marketability of canoeing and kayaking. The extensive evidence of industrial forestry has compromised the potential of some river sections. Visual quality is a very important attribute for this pursuit. Hydroelectric activity is a major consideration for river and lake product – water levels will influence how and where development can take place. The most reliable flow rates/levels for river activities are associated with fall to spring precipitation (which are also colder months). ▪ If an operator uses a specific land feature such as a beach or camp on a regular basis then CBR tenure will be required. Typically, conflicts with other users are low, but jet boats can be a problem in high use areas. ▪ Development of this product is compatible with both Golden and Revelstoke

	economic/tourism development strategies. Employment and economic impacts are modest but favourable and do not require tradeoffs with other activities.

Resource Analysis

Terrain / Location Factors	▪ Typically, larger lakes with variable shorelines, and attractive scenery with little sign of human presence are the primary attractants for this activity. Generally, lakes that permit half-day to full day paddling and enable participants to achieve a sense of isolation (including being away from other participants) are preferred. Smaller lakes can also have potential, but would require the presence of additional features to enhance the experience. Such features include historical or cultural sites, wildlife viewing, sandy beaches, waterfalls, fishing, etc. ▪ Less modified landscapes are preferred to highly modified landscapes.
Infrastructure Requirements	▪ Infrastructure requirements for canoeing/kayaking are modest but it is important to have convenient access (put-ins / pull-outs). ▪ Road access and secure parking at put-in and tale-out locations.
Environmental / Wildlife Issues	▪ As with other activities, the presence of wildlife is a major attractant for this canoeing / kayaking. The majority of wildlife issues can be managed through appropriate behaviour, temporal and spatial closures and restrictions. Depending on area and amount of use, restrictions such as designated routes to minimize impacts on vulnerable species may be required. ▪ Potential wildlife species affected might include elk, deer, moose, black and grizzly bears, small mammals, and various bird and fish species. ▪ New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15] ▪ Environmental issues faced by canoeing and kayaking can include human waste management; erosion at put-in and take-out locations, and wildlife disturbances.
Access or Land Use Issues	▪ The single most important consideration for commercial canoeing and kayaking opportunities is access (either by driving and flying) to high opportunity paddling areas. ▪ The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. ▪ Use of logging roads for access may face conflict with active logging operations. ▪ Use of or access over private land will require the permission of the private landowner. ▪ Where activities occur within designated Forest Recreation Sites, they must comply with the recreation management objectives established by the Ministry of Forests for the site. ▪ The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land

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[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

	base.
Tenure or Legal Issues	▪ The presence or absence of tenure is not a major issue unless public access to lakes is restricted. Then either specific tenure for access to the put-in/take-out site is required, or tenure for access to specific areas of the shoreline for camping and picnicking purposes is required. Parks and protected areas are often associated with high quality lake paddling opportunities. However, specific management policies may restrict commercial operations. In some locales, paddlers wishing to fish as part of their experience may come into conflict with guided fishing outfitters. ▪ All commercial recreation activities occurring on provincial crown land require a tenure that is issued by the British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures[54]. ▪ Commercial activities occurring within National Parks require the acquisition of a Business License and compliance with National Park regulations[55]. ▪ Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these forest licensees. ▪ All commercial activities that occur on provincial crown land require appropriate liability insurance coverage.
Capacity or Conflict Issues	▪ Some areas that provide high opportunities for canoeing and kayaking are within areas where the viewscape has been degraded due to logging, mining, and other forms of human alteration of the landscape. This is can be a deterrent to this activity. ▪ Separation of mechanized watercraft from non-mechanized watercraft is an important constraint. Clients on commercially led canoe/kayak trips are looking for a sense of isolation and wilderness. Typically, they do not want to hear or see other motorized watercraft. Larger lakes that provide the best opportunities for lake paddling trips also tend to attract powerboats.

5.3.7.3 Overall Potential

The best potential is in the soft adventure/participant category for domestic, short-haul and German markets. All of these markets are seeking a broader outdoor adventure experience and will decide to participate in recreational paddling once in the region. The Columbia can offer a full range of close-in/remote adventures and is very well positioned to attract short-haul and German visitors, as the majority enters BC through the Alberta/BC border, primarily the TCH. Nature observation, wildlife viewing and fishing are also attractants for these markets. The German market, especially, is interested in wildlife viewing. Whether canoeing or kayaking, product development has to incorporate some outstanding recreational feature, aesthetic appeal or valued secondary activity. Multi-activity packaging and interpretation is essential.

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[54] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[55] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations*.

The Columbia also has some outstanding rivers that offer higher grades of difficulty that appeal to enthusiasts and extreme sports, although most of the current commercial guiding is for rafting (e.g. Illecillewaet, Kicking Horse).

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *Canoe/Kayaking* tourism ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Please refer to **Appendix 3** for the detailed workshop results.

Canoe/Kayaking Product Ideas	
Revelstoke	**Golden**
▪ Rental / sales outlet ▪ Events – EcoAdventure Race series (combined with other activities) ▪ Instruction School* ▪ Tours – Arrow Lakes* ▪ Multi-day sea kayak tours ▪ Guidebook ▪ Combine with other activities o Combine with resort o Combine with other "more sexy" destinations and experiences o Partner with food & accommodation suppliers	▪ Kayak park / race course ▪ Canoe and kayak school, courses and rentals ▪ Shuttle service for paddlers with own boats / rental boats ▪ Bird watching by canoe / kayak ▪ Heli kayaking ▪ River camping opportunities

5.3.7.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are five areas that have the highest opportunity values for the activity of canoeing and kayaking resulting from the preceding *Market Assessment* and *Resource Analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 7**).

Figure 7: Canoeing and Kayaking Map

Columbia River Reservoirs – (Upper Arrow Lake, Lake Revelstoke, Kinbasket)

Upper Arrow Lake, Lake Revelstoke and Kinbasket Lake have high opportunity values for canoeing and kayaking in the Forest District due to their size. These three lakes are the only sizeable bodies of water in the district that enables participants to undertake a multi day paddling experience. Currently, Upper Arrow Lake is used by a tour company as a location for multi day canoe trips (focusing on European clients). The lakes have public access points, Provincial Park and forest service campgrounds along their shores, and have for the most part, relatively little motorized use.

The drawback of the area is the visual values of highly modified landscapes from forest activities. In addition water levels in Upper Arrow Lake and Kinbasket Lake can fluctuate dramatically through the spring, summer and fall.

Goldstream River

The Goldstream River flows into Lake Revelstoke on its eastern shores. The lower portion of the river provides a pleasant 18-kilometre paddle down the meandering river through marshy sections rich with bird and wildlife. This section of the river is classified as grade 1 suitable for novice canoe and kayak paddlers. A local tour company out of Revelstoke occasionally uses the river for day trips. There is good access to put-in and take-outs along the river. This section of the river flows through a modified landscape from logging activities.

Columbia River (Golden – District Boundary)

The Columbia River wetlands complex (the portion of the river from the district boundary in the south to Donald in the north) is part of an internationally recognized area for birds (RAMSAR). The river provides outstanding opportunities for bird and wildlife watching. The area is part of a provincial Wildlife Management Area to protect these internationally important natural values. The river is a pleasant grade 1 suitable for novice paddlers, and is rarely used. Put-in and take-out locations are limited as are opportunities for camping. The river is currently used by a number of commercial tour operators for bird watch trips.

Kicking Horse River

The Kicking Horse River is fast flowing, high volume, grade 3 to 5 class river suitable for expert kayakers and canoeists in closed boats. The river is currently used as a commercial river-rafting run by a number of companies. Access to the river is limited to the Beaverfoot Bridge (access is expected to change in the near future with proposed upgrades to the Trans Canada Highway). The river has an international reputation as an exhilarating run for skilled paddlers. The river is at capacity for commercial river rafting. Portions of the river have high natural values for mountain goats.

Lower Blaeberry River

There are two sections on the Lower Blaeberry River, which have high opportunity values for canoeing and kayaking. These are the sections between Mummery Creek to Split Creek, and form the IOOB campground to the Trans Canada Highway. The section in the middle is un-navigable due to a canyon and waterfall. The Mummery to Split Creek section is a gentle grade 1 canoe route through braided sections of the Blaeberry River. The second section of the river is a scenic paddle through the Blaeberry Valley on grade 1 and 2 class water. The Blaeberry River is good access and is close to the Town of Golden. There is currently no commercial use of the river.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Canoeing / Kayaking Issues	Upper Arrow, Revelstoke, & Kinbasket Lakes	Goldstream River	Columbia River	Kicking Horse River	Lower Blaeberry River
Infrastructure Needs			✓	✓	
Environmental / Wildlife	✓	✓	✓	✓	✓
Access / Land Use			✓	✓	
Tenure / Legal	✓	✓	✓	✓	✓
Capacity / Conflicts		✓		✓	

Fishing

5.3.8 Fishing

5.3.8.1 Activity Description

This activity includes fly-fishing and the use of spinning and casting gear from shore or from boats. Fishing occurs throughout the district on almost all bodies of water that are large enough to sustain harvestable quantities of fish. The reservoirs on the Columbia River (Upper Arrow Lake, Lake Revelstoke, and Kinbasket Lake) provide by far the greatest fishing opportunities as they are very large and are stocked regularly by the provincial government. A number of small alpine lakes and some creeks or rivers also provide good fishing opportunities, but cannot sustain large numbers of fishers.

5.3.8.2 Market and Resource Analysis

Demographics

In Canada, the 1996 participation rate for recreational fishing (both freshwater and saltwater) was 17.7 percent and in BC, 17.5 percent. Freshwater fishing was the fifth most popular sport in the US with 45.8 million people participating in this activity at least once in 1998.[56] Participation rates have held steady or experienced a slight decline in Canada and the US over the last decade.

In 1998, 80% of the BC freshwater sport fishing market was from BC, 9% from elsewhere in Canada and 11% from non-Canadians.[57] While the proportion of BC residents has remained level over the last 20 years, the proportion of non-Canadians has doubled while the proportion of other Canadians has halved. Interestingly, the percentage of juvenile anglers from BC has been increasing over time to the point where one third of all participants are now under the age of 16.[58] According to a 1988 study[59], in Canada the customers of freshwater fishing lodges tended to be male (64%), mainly between the ages of 35 and 54 (42%), and travelling either with families (38%) and as couples (30%). Similar studies in the US have shown participant demographics to be quite similar to Canada's.[60] While overall participation rates appear stable, spending on fishing has increased considerably over the last 10 years, a reflection of the increased affluence of fishing markets, especially among the lodge-based segment. In the freshwater fishery, spending on packages represents only a small part of the total expenditures, but perhaps surprisingly, the origin of purchasers is evenly split between BC residents and non-residents.

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[56] The Province, January 5, 1998.

[57] BC Visitor Study, Tourism BC, 1997.

[58] BC Sport Fishing Industry Profile, BC Fisheries, 1999.

[59] Fishing Lodges and Resorts in British Columbia: Marketing and Development Initiatives, DPA Group Inc., March 1988.

[60] National Survey on Recreation and the Environment, Outdoor Recreation Resources Review Commission, 1994-95.

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers: 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

The **casual angler** values easy access to the fishing venue, the lodge accommodation and settings, and other activities offered during the stay. This segment is more likely to consist of families and couples. The casual angler will more likely require basic instruction beforehand. The **sport fisherman** values the opportunity for excellent fishing and guiding services. This market segment looks for remote, wilderness-like settings with high quality fish and few other participants. The sport fisherman is willing to pay more for the fishing experience than the casual angler and will base the decision firstly on the quality of fishing. The sport fisherman will also likely bring his (or her) own fishing gear and tackle.

In general, **overseas visitors** are serious sportsmen looking for fishing in a remote wilderness area with restricted access. Given the longer distance travelled, overseas visitors will take longer trips and be willing to pay more for an exclusive, once-in-a-lifetime experience. **Local visitors** will take more trips throughout the year, and may engage in more unguided fishing trips once becoming familiar with an area.

Market Assessment

Target Markets	▪ Casual anglers among all visiting markets.
Competition	▪ Many other areas of the province have higher profiles as fishing destinations and much better infrastructure. Tourism BC lists more than 60 freshwater fishing lodges and 660 angling guides in the province in 1998.[61] Fishing destinations on Vancouver Island, Central Coast, North Coast, Northwest and Interior have well developed camp/resort sectors ranging from the simple campground and RV hookup right up to luxurious fly-in resorts.
Demand	▪ Overall demand is not believed to be increasing significantly, but it is shifting. Non-resident visitors and younger, casual anglers are growth markets.
Development Factors	▪ Opportunities in the freshwater sport fishery are highly dependent on government regulations and stock availability. The Columbia is not known

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[61] BC Sport Fishing Industry Profile, BC Fisheries, 1999.

	as having a highly productive fishery and dammed waterways are not known to be beneficial to the sport fishing sector. However, a recent fertilization program for Upper Arrow Lake has dramatically increased the size and number of spawning Kokanee. Nonetheless, if tourists cannot undertake fishing in a successful, convenient and cost-effective manner, then they will go elsewhere.

Resource Analysis

Terrain/Location Factors	▪ Apart from the obvious need of having an ample and sustainable supply of fish, fishing benefits from scenic views, as well as good access and egress points, and places to take shelter if the weather "blows up". Added advantage can be gained if trip starts are in proximity to communities or major paved roads. This diminishes the trailering and hauling requirement and maximizes time spent on the water. ▪ Extended fishing trips benefit from a variety of fishing experiences (e.g. large lake, alpine lake, creeks or rivers) within relatively close proximity to each other, since fishers often enjoy fishing with different types of gear for different species. ▪ Locations that have supporting infrastructure nearby have a decided advantage. Also, nearby access to other activities for spouses or vacation variety is an asset. ▪ Large seasonal fluctuations of water levels on Kinbasket Lake and Upper Arrow Lake in particular, can have an impact on access and egress, as well as the availability of fish.
Infrastructure Requirements	▪ Destination fishers require accommodation, with higher-end lodges representing the top of the spectrum. Some come for a more rustic outdoor adventure and wilderness campsites are preferred. ▪ Good boat launches for access and egress are a necessity. Wharfs for mooring may also be required. ▪ Transportation is a major factor, and good road access or helicopter access (depending on the product being sold) is required. ▪ Although many fishers supply their own gear, fishing equipment that is suited to the local conditions needs to be available for guests. The boat(s) need to be adequate for the type of water being fished. ▪ A knowledgeable guide is usually a necessity for
Environmental / Wildlife Issues	▪ Wildlife Issues include potential interactions with moose, black bears and grizzly bears while at camp. There is some possibility of disturbing nesting waterfowl when fishing in near-shore areas. ▪ New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15]
Access or Land use Issues	▪ The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. ▪ Use of or access over private land will require the permission of the

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[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

	private landowner. ▪ Use of logging roads for access may face conflict with active logging operations. ▪ Where activities occur within provincial Forest Recreation Sites, they must comply with the recreation management objectives established by MoF for the site. ▪ The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	▪ All commercial recreation activities occurring on provincial crown land require a tenure that is issued by British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures[62]. ▪ Commercial fishing guide license is required from the province of BC. ▪ Commercially guided fishing activities occurring within National Parks, require the acquisition of a Business License, fishing licenses for individual fishers and compliance with National Park regulations[63]. ▪ Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these licensees. ▪ Commercial activities taking place on Crown Land require appropriate liability insurance coverage.
Capacity or Conflict Issues	▪ The probability for conflict with other users on the reservoirs and fishing lakes of the district is quite low, however, there is quite a lot of recreational power boating near Revelstoke and the lower end of Lake Revelstoke, which may diminish the sense of solitude. ▪ Because the reservoirs are nutrient-poor, there is some question as to the sustainability of fish species, notwithstanding the recent fertilizer programs.

5.3.8.3 Overall Potential

The region is not well known among potential guided markets as a fishing destination; neighbouring areas have more variety, bigger fish and greater quantities of fish. However, the fishing resource is well suited for development as a secondary activity that could be targeted at the casual angler who is visiting for some other primary purpose. Therefore, the ability to provide visitors with alternative activity options is important. Experienced operators are now trying to diversify to protect themselves against declining participation and in the case of the coastal industry, further sport fishery restrictions. Many fishing lodges have broadened their products in the last few years and met with some success in catering to casual anglers (as opposed to sport fishermen).

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[62] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[63] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations.*

In the Columbia, new development could focus on the growing percentage of juvenile anglers in the market, linking complementary products that have appeal for families and young people.

There may be some potential for expansion through the development of remote access, lodge-based fishing. This may or may not involve the use of helicopters (in which case the angling must be within a reasonable distance of the staging area to minimize transportation costs). The opportunity to link freshwater fishing with nature appreciation/ wildlife viewing and boating can be accomplished by increasing interpretation and awareness and creating multi-activity packages.

There is also further potential to expand fishing excursions on the region's reservoirs. Weather and safety conditions would have to be factored into development, but the lakes are well stocked and can provide access to numerous small creeks and streams where there is little fishing pressure.

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the fishing tourism product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Some ideas were combined as the focus group felt that there was not adequate capacity in the "stand-alone" ideas to merit business development. Please refer to **Appendix 3** for the detailed workshop results.

Fishing Product Ideas	
Revelstoke	**Golden**
Guided fishing tours*	Guided tours*
Heli-fly fishing	Fishing equipment and supplies rental, sales and retail*
Fishing Resort & Marina*	Fishing schools and instruction programs*
Courses / Instruction	Fishing lodge
Tackle Shop	Heli fishing
	Wildlife and scenic viewing
	Ice fishing
	Fly fishing

5.3.8.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are four areas that have the highest opportunity values for the activity of fishing, resulting from the preceding *market assessment* and *resource analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 8**).

Figure 8: Fishing Map

Upper Arrow Lake

Arrow Lake extends from Revelstoke in the north, 230 km south to the community of Castlegar (Hugh Keenleyside Dam). The portion of this large reservoir that is in the Columbia District extends from Revelstoke to Shelter Bay area – approximately 50 km. Access to the upper reservoir is limited, as there are few roads that extend down to the water's edge. This has had the benefit of limiting development along the shoreline, and much of the lake still has a wilderness feel to it. The mountains of the Selkirk Range on the east and the Monashee Range on the west provide spectacular views. Water levels fluctuate seasonally (up to 20 metres max.), and can present a hazard to boaters if uncertain of the water. Storms tend to funnel along the narrow lake and care must be taken in inclement weather. Arrow Reservoir and the surrounding area provides opportunities for boating, fishing, water skiing, camping, picnicking, hiking house boating, heritage interest, boat touring, hot spring bathing and viewing. The reservoir is part of along navigable waterway stretching from Grand Coulee Dam in the USA to Revelstoke. A lock in the Keenleyside Dam facilitates boat passage between the Columbia River and the Arrow Reservoir.[64]

Lake Revelstoke

Lake Revelstoke is a large man-made reservoir created by the damming of the Columbia River at Revelstoke in 1984. It extends 150 km north to Mica. As a run of the river operation, Lake Revelstoke is normally maintained at full capacity or within one metre of full capacity. It operates in balance with the Mica Dam and Kinbasket Reservoir. During much of the year, discharges through the Revelstoke Dam match inflows, so that the reservoir fluctuations are small. The valley in which the lake sits is very narrow, with vistas of the Selkirk Mountains and Monashee Mountains on each side. The lake is heavily used by locals, but due to its large size, it is not considered to be at capacity. Over the years there have been several fish enhancement projects. The main species sought on the reservoir are Kokanee, Dolly Varden, Rainbow Trout, Ling (burbot) and Mountain Whitefish[65]. Weather can be a hazard as can occasional floating debris from logging operations. The water in the reservoir is extremely cold.

Kinbasket Lake

Kinbasket Lake is a very large reservoir formed along the Columbia and Canoe river valleys by the construction of the Mica Dam was formed by the completion of the Mica Dam in 1973. The reservoir splits north up Canoe Reach and south along Columbia Reach. It extends for a total of 216 km from Valemount in the north to Donald Station in the south. The portion of the reservoir extending north

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[64] Recreation Opportunities Inventory, BC Hydro, Report No.ER 99-08, 1999. p.113-114

[65] Lake Revelstoke Reservoir Integrated RecreationPlan, Prepared by Lake Revelstoke Reservoir Recreation Work Group, 1996. p.16

(Canoe Reach) is outside the study area. The water levels in Kinbasket Lake fluctuate dramatically (up to 50 metres). This creates enormous challenges for fishers in gaining access to the water and equally for fish as their habitat is significantly altered seasonally. This is a very scenic wilderness area with the Rocky Mountains on the east and the Selkirk and Monashee Mountains on the west. The general lack of good access, remote location and accumulations of floating wood debris have been constraints to recreational use.[66]

Susan and Blackwater Lakes

This area is located approximately 30 to 40 km north of Golden and may be accessed on good logging roads – turning off Highway #1 at Donald. These lakes are in the valley bottom of the Rocky Mountain trench, at relatively low elevations. **Susan Lake** provides good year-round fishing (ice fishing in winter). There is a forest recreation site available for camping as well as a boat launch and wharf. It is stocked regularly with rainbow trout. Blackwater Lakes are connected in a series along the upper Blackwater River. They are easily accessible from an adjacent forest service road. There is camping available at forest recreation sites, and the area is popular with families and car-top fishers. While locals frequent these lakes, there is better fishing in the adjoining Invermere Forest District to the south. The principal species are rainbow trout and brook trout.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Fishing Issues	Upper Arrow Lake	Lake Revelstoke	Kinbasket Lake	Susan and Blackwater Lakes
Infrastructure Needs	✓	✓	✓	
Env't/Wildlife	✓	✓	✓	✓
Access/Land Use	✓	✓	✓	
Tenure/Legal	✓	✓	✓	✓
Capacity/Conflicts				✓

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[66] Recreation Opportunities Inventory, BC Hydro, Report No.ER 99-08, 1999. p.167

Hiking

5.3.9 Hiking

5.3.9.1 Activity Description

The activity of Hiking involves the use of trails, generally to access alpine and sub-alpine destinations. It can either be on a day use or multi day use basis. Multi day backpacking is essentially an extended hiking trip where the participant must carry all personal gear, is required to camp-out, and is travelling in remote or semi-remote terrain for up to several days at a time.

5.3.9.2 Market and Resource Analysis

Demographics

The hiking market in Canada has a very broad based demographic profile with an even distribution across age groups and by gender. BC and Canadian residents make up three quarters of the market, while equal shares of the remaining quarter are accounted for by US and overseas visitors. Hiking is a primary trip activity for Canadian travellers, with 32 percent, or 5.2 million, participating in hiking or walking on their last long overnight pleasure trip.

Of all outdoor recreation activities, hiking has been one of the highest growing in terms of participation in the US. The US market grew by 93 percent from 24.7 million participants in 1982-1983 to 47.7 million participants in 1994-1995.[67]

Hiking has a very good participation rate, and therefore high demand, among Europeans, especially Germans.

Hiking is often combined with other activities such as wildlife viewing; camping and backpacking, all of which are experiencing increased participation levels. Many surveys combine hiking with backpacking for their statistics. As well, many operators include backpacking and extended trekking under the category of guided hikes.

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers : 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

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[67] National Survey on Recreation and the Environment, 1994-1995.

Hiking **enthusiasts** participate frequently and are more likely to take trips on their own. Since many hiking trails are well-marked and documented through guidebooks, hiking trip operators must provide additional value to these types of customers either through a high-end experience (not only the hike but interpretation, meals and lodging) and/or adding in other desired activities which they cannot do on their own.

Most **participants** in hiking tours tend to be well travelled, educated and single, although the family and friend market is growing.[68] Many of them become repeat clients – an important point for tour operators as it implies the need to provide a variety of trips including custom trips for repeat customers. These hikers look for a trip combined with cultural, heritage and other nature-oriented activities such as wildlife viewing.

Based on this view of the hiking market, operators can either target the soft adventure traveller who seeks a high-end, fully-catered product delivered in a safe, comfortable environment that includes comfortable lodging, or the hiking enthusiast that prefers a more participative, physically demanding experience. Hiking enthusiasts prefer to hike on their own and participate in a tour only if it involves a significant interpretive component or hiking across unknown/unmarked terrain.

The hiking market can also be segmented according to **fitness** versus **nature enthusiast** participants. Hiking has become a popular way of improving one's fitness while enjoying the outdoors. Hikers who value the fitness benefit will seek more difficult hikes. The nature enthusiast values the enjoyment of the surrounding environment and will prefer soft adventure tours that include interpretation and education.

In Canada, hiking operators often offer other activities in conjunction with the hike; more than half offer nature observation as a secondary activity, 34% wildlife viewing and 32% cross-country skiing. Hiking is also provided by operators offering primarily trail riding, canoeing and nature interpretation products.

Market Assessment

Target Markets	• All markets, especially the soft adventure visitors among short-haul (Canada and US), long-haul (Canada and US) and overseas markets (Germany). • Hiking enthusiasts (interpretive tours into new areas) • Park visitors, including tour travellers.
Competition	• There is extensive competition regionally, nationally and internationally for travellers interested in pursuing hiking. For the hiking enthusiast in pursuit of a challenging, wilderness trek products like the West Coast Trail, the Nootka

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[68] Nova Scotia Marine Tourism Study Final Report, p.64, The Economic Planning Group of Canada, December 1997.

	Island Trail and Berg Lake Trail have well-earned reputations and regularly attract capacity visitation. The neighbouring national parks also cater extensively to this market. Similarly, many communities and all parks have developed trail inventories and related services that create a safe and interesting product for the soft adventurer/participant.
Demand	▪ Demand will continue to increase for hiking both as a primary activity and as a secondary activity in conjunction with other products. Because of its accessibility, low skill requirements, relative safety and instant appeal, growth rates among North American and European hiking markets are expected to continue to climb even as the overall population ages.
Development Factors	▪ The Ministry of Forests and BC Parks have significant trail inventories, but no tourism mandate. Communities will have to remain active to ensure their trail products meet demand and that resource-user conflicts are kept to a minimum. ▪ Hiking is compatible with other recreation uses in the area. Uncrowded trails are preferred, particularly those attracted to backcountry hiking. Visual and acoustic quality is important so the quality of the experience is sometimes dependent on other resource users in the hiking areas. ▪ For backcountry hiking and backpacking that appeals to enthusiasts, alpine and sub-alpine environments are preferred and the built environment becomes less important. ▪ The development of hiking complies with the economic development goals of Revelstoke and Golden. The economic impacts can be substantial if communities are successful in penetrating the TCH touring market and converting them into soft adventurers.

Resource Analysis

Terrain / Location Factors	▪ Clients on commercially led trips prefer not to hear or see other mechanized vehicles. Preference is for remote pristine appearing environments separate from other areas where mechanized use is permissible. ▪ Many of the preferred (alpine) destinations for this activity often have a very short snow-free season (late June/early July to late September); thus the commercially viable season is small. ▪ Hiking and Backpacking requires a high quality wilderness setting with a strong sense of isolation and attractive scenery. Alpine and sub-alpine environments are particularly favoured. ▪ The availability of trails is an important consideration in treed areas. A high quality outdoor hiking experience without trails is next to impossible in the lush forests of the Interior Wet Belt. ▪ In the alpine zone, slope becomes a limiting factor as steep slopes can often have dire consequences for mishaps. ▪ Features such as fishing, lakes, waterfalls, cabins, wildlife viewing opportunities, historical features etc. can enhance the experience. Their absence can also detract from the experience and therefore the model takes both into account.
Infrastructure Requirements	▪ Hiking depends on the existing trail and road infrastructure for access and routes. In general, the better the signage, parking, garbage disposal, washrooms, and interpretative facilities the better the trip experience will be

	for users. This means quality map information and investment in public facilities. The private sector is rarely solely responsible for development simply because it does not have the necessary access to the land. Communities have an excellent opportunity to enhance their hiking product, especially in the frontcountry, as it can be developed in conjunction with recreation initiatives.
Environmental / Wildlife Issues	▪ Often the presence of wildlife is a major attractant for this activity. The majority of wildlife issues can be managed through appropriate behaviour, temporal and spatial closures and restrictions. Depending on area and amount of use, restrictions such as designated trails to minimize impacts on mountain caribou and other species may be required. ▪ Potential wildlife species affected might include elk, deer, moose, mountain goats and sheep, black and grizzly bears, and mall mammals. ▪ New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15] ▪ Environmental issues faced by hiking and backpacking can include human waste management; damage to fragile vegetation in alpine environments and wildlife disturbances.
Access or Land Use Issues	▪ An important constraint for this activity is the presence or absence of vehicular access to trailhead areas. Without access, the highest capability areas cannot be utilized. Trailhead has to be accessible within a short hike from where the vehicles must be parked. ▪ The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. ▪ Use of logging roads for access may face conflict with active logging operations. ▪ Use of or access over private land will require the permission of the private landowner. ▪ Where activities occur within designated Forest Recreation Sites, they must comply with the recreation management objectives established by the Ministry of Forests for the site. ▪ The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	▪ Some areas with high opportunity values for hiking are within protected areas such as national parks. Such areas may or may not accommodate commercial backcountry recreation depending on management plans and policies. ▪ Within the areas administered by the Ministry of Forests, often there is a competing use for the land base between logging and recreational use. Since natural landscapes with little alteration are preferred, active logging and clear cuts can be a major constraint for hiking. ▪ All commercial recreation activities occurring on provincial crown land

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[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

	require a tenure that is issued by the British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures69. ▪ Commercial hiking and backpacking activities occurring within National Parks require the acquisition of a Business License and compliance with National Park regulations70. ▪ Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these forest licensees. ▪ All commercial activities that occur on provincial crown land require appropriate liability insurance coverage.
Capacity or Conflict Issues	▪ Many of the trails used by hikers area also used by mountain bikers and horseback riders. The differing visitor expectations of these groups can negatively impact upon the visitor experience of each group. In addition, the physical changes to the landscape rout by the competing activity can be viewed negatively by other users (deeply cut in horse trails, horse manure, trail erosion from mountain bikes, etc.). ▪ Some of the more popular hiking trails in the national parks may be nearing capacity (Lake O'Hara trails, Rogers Pass, Summit of Mount Revelstoke).

5.3.9.3 Overall Potential

Development prospects in the Columbia area are positive because of high quality resources, excellent trail systems and visitor markets that place a high value on hiking activity. Among visitors to the Columbia, hiking/backpacking is the third most important activity with a participation rate of 14% among non-residents. The potential for commercial hiking tours spans a full range of options from multi-day trekking tours to short interpreted tours of the frontcountry.

While trail development and interpretation is important, the key to building a hiking product in the Columbia may be related to marketing and promotion that will get TCH travellers off the road, into the communities and onto its trails. Any curtailment of activity in the neighbouring national parks will create spill over for the surrounding Crown land base and, presumably, those operators and communities with the facilities and capacity to accommodate more visitation.

There are numerous aides for self-guided hiking in the region, including trail books, books, maps and web sites. The Canadian Rockies is one of the most exhaustively researched hiking areas in Canada and recreational organizations offer numerous resources to assist their members with access. Thus the benefits accrued through this activity will be primarily though unguided hiking.

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[69] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[70] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations*.

Commercial operators must provide additional value to gain customers, either through a quality experience (not only the hike but interpretation, meals and lodging) and/or adding other desired activities, which the customers cannot do on their own.
Many hiking participants become repeat clients, so increasing the opportunity for new experiences should increase the potential for repeat customers.
Communities in the study area have a range of hiking product that they can packaged with cultural, heritage and other nature-oriented activities. For example, further interpretation of unique features like the Columbia wetlands would significantly enhance the frontcountry hiking product in the Columbia Valley.

Backpacking and heli-hiking in more remote and high elevation locales could be augmented by hut development, which would allow for multi-day tours, and linkages with higher quality amenities (e.g. accommodation). This product would appeal to the hiking enthusiast market. There is a growing market, especially in the US, for wilderness camping.

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *Hiking* product ideas that were identified at the workshops. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Please refer to **Appendix 3** for the detailed workshop results.

Hiking Product Ideas	
Revelstoke	**Golden**
▪ Tie in with nature walks* ▪ Guidebook – link with park guidebooks ▪ Trail construction business ▪ Guided hikes from hotels* ▪ B&B specializing in hiking ▪ Combine with interpretation* ▪ “Travel Agency” for local opportunities	• Guided interpretive and nature tour hikes* • Multi day alpine tours* • Wilderness skills / outdoor school* (The above three ideas were combined into one product) • Retail outlet • Shuttle service (The above two ideas were combined into one product) • Elder hostels* • Retreats (based on themes of music, art, painting, health, meditation, etc)* • Lodge* (The above three ideas were combined into one product)

	• Heli hiking

5.3.9.4 Selection of High Opportunity Areas

Within the Columbia Forest District, there are six areas that have the highest opportunity values for the activity of hiking resulting from the preceding *Market Assessment* and *Resource Analysis*. These areas are described below and are identified on the accompanying 1:1,250,000 scale map (**Figure 9**).

Figure 9: Hiking Map

Revelstoke Area

The Revelstoke Area has a number of outstanding hiking areas. These include Mount Revelstoke National Park with a focus on the trails originating off the Meadows-In-The-Sky-Parkway, Mount MacPherson and Begbie areas, Mount Mackenzie, Cartier, McCrae and Sproat areas. All of these areas have well maintained and developed trail systems by government agencies. In addition, the trails are well signed and many guidebooks are available on the trails.

These trails are well used by locals, tourists and visitors. Most of the trails provide access to alpine areas with spectacular vistas. The Mount Begbie and MacPherson areas have an existing commercial recreation tenure for heli-hiking.

Keystone / Standard Basin

Keystone-Standard Basin, located approximately 50 kilometres north of Revelstoke on the east side of Lake Revelstoke, is a well known alpine hiking destination in the region due to its scenic alpine vistas, wildflowers and topography. The area is a designated BC Forest Service Recreation Site due to its high recreation values for a number of activities. The area is accessible by a logging road with the trailhead situated high up the mountainside in the sub-alpine. An existing 18 kilometre trail winds its way along alpine meadows and ridges to a backcountry cabin. The trail is suitable for all levels of hikers.

Keystone-Standard Basin is heavily used for recreation in both winter and summer. In the summer, the area is used extensively for berry picking and mountain biking, with some ATV'ing and horseback riding also occurring. Each user group has its own expectations in terms of visitor experience. These expectations have the potential to create challenging differences of opinion as to how the land base should be utilized. Currently, there are no existing summer based commercial recreation tenures in the area.

Rogers Pass – Glacier National Park

Rogers Pass in Glacier National Park is a hikers heaven. The park maintains over 150 kilometres of hiking trails suitable for all skill levels. The park's rich history associated with the building of the Trans Continental Railway and the birthplace of mountaineering in North America, add to the area's allure and appeal. In addition, there are numerous visitor facilities including two frontcountry campgrounds, four backcountry cabins, numerous backcountry campsites, a visitor centre and park safety services. Glacier National Park annually receives well over 35,000 hikers each year. All of the trails are easily accessible by vehicle.

Many of the parks trails are at or near capacity at during the peak summer period of July and August. All commercial tours operating in a national park require a National Park Business License. Refer to **Appendix 5** for additional information on business opportunities in the National Parks.

Dogtooth Range

The Dogtooth Range lies to the west of the Town of Golden and runs in a north-south direction from the Trans Canada Highway in the north, to the district boundary in the south. Within the Dogtooth Range, are many well-established and maintained BC Forest Service hiking trails (Gorman Lake Trail, Dawn Mountain Trails, Whitetooth Ridge trail, Canyon and Moonraker trails, Lang, 12 mile, and Quartz Creek). This area has multiple drainages with opportunities for nested trail loops to accommodate day and multi-day hiking, and high alpine traverses.

Within the area, there is an existing commercial recreation license for heli-hiking, and a nearby commercial backcountry lodge (Purcell Lodge). As well, there are a number of wildlife issues in the area including important grizzly bear habitat.

Hospital Creek Complex

The Hospital Creek Complex is a unique alpine hiking area that is close to the community of Golden. An existing trail network provides access to alpine ridges and the opportunity to do alpine traverses from one drainage to another. It is suitable for hikers of all skill levels. Locals primarily use the area. There are no existing commercial recreation licenses or tenures in the area.

Yoho National Park

Yoho National Park has a number of hiking areas that range from leisurely day hikes, to challenges alpine traverses. By far, the most popular hiking area in the park is the Lake O'Hara trails complex. Due to its popularity and fragility of the sub-alpine environment, a visitor quota has been instituted for the area. Numerous commercial tour companies, all of which require a National Park Business License, use Yoho National Park. As part of the four-mountain national parks complex (Banff, Jasper, Kootenay and Yoho), Yoho has international name recognition and attraction. As a result, some of the park trails are at or near their natural and social carrying capacities. However, within the park, there are still tourism hiking opportunities to utilize the well-maintained trail network. Refer to **Appendix 5** for additional information on business opportunities in the National Parks.

The following table summarizes the issues that are pertinent to each of the identified *high opportunity areas* for this activity.

Hiking Issues	**Revelstoke Area**	**Keystone / Standard Basin**	**Rogers Pass**	**Dogtooth Range**	**Hospital Creek Complex**	**Yoho National Park**
Infrastructure Needs						
Environmental / Wildlife	✓	✓	✓	✓	✓	✓
Access / Land Use		✓		✓		
Tenure / Legal	✓		✓	✓	✓	✓
Capacity / Conflicts		✓	✓			✓

Natural & Cultural Features Viewing

5.3.10 Natural & Cultural Features Viewing

5.3.10.1 Activity Description

This activity involves the appreciation and enjoyment of an area's natural and/or cultural features. Typically, this occurs as part of another activity, but it may be the sole purpose of a person's trip. This activity may be undertaken as part of an auto, van, bicycle or bus tour, or be part of a backcountry trip involving hiking, canoeing or kayaking. Scenic flights are also a common method of providing a quick overview of spectacular natural features.

5.3.10.2 Market and Resource Analysis

Demographics

Nature observers are typically involved in watching, interpreting or photographing flora, geological or other natural resource features. Travellers with a cultural/historical interest are attracted to aboriginal culture as well as colonial and industrial heritage features. Each of these market segments vary in their demographic characteristics. While some data is available on the wildlife viewing and nature observer markets, little is known about cultural/historical travellers.

Nature observers and wildlife viewers tend to be baby boomers in the 35-55 years bracket, evenly distributed between women and men. However, nature observers are more likely to travel solo or be on business than other consumers of adventure products. Wildlife viewers travel extensively as couples or families.[71]

Visitors to BC have a very high interest level in nature and cultural/historical observation. More than 50% of non-resident visitors participated in land-based wildlife viewing, approximately 30% explored the backcountry/wilderness, and 50% visited historical and native cultural sites during their trips.[72] Importantly, in all these activities, non-resident participation was significantly higher than resident participation.

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[71] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[72] *BC Visitor Study Report on Travel in British Columbia*, Tourism BC, 1997.

Among tourism operators, the Canadian market represents approximately half of both the nature observation and wildlife-viewing participants. The US is a very important market for these activities as well. In fact, nature observation (51%) and whale watching (30%) are among the activities with the highest percentage of American visitors. The German market is also important to the "Other Wildlife Viewing" segment, primarily through their interest in bear viewing.

Birdwatching is a fast growing sub-segment of the viewing market and its participants are generally older, more educated and affluent than those in other wildlife viewing activities.[73] BC residents are active participants with 32% involved in wildlife viewing and 20% in birding.[74] There are opportunities to target both BC residents and out-of-province visitors in this growing market. The participants in this activity also fit the profile generally associated with the soft adventure traveller.

The national parks are a significant draw for Canadian participants in this activity. Thirty-nine percent of all visitors consider parks an important factor when determining their vacation plans.[75]

Market Segments

The following breakdown of market segments is based on two primary behavioural characteristics exhibited by outdoor adventure travellers : 1) The number of times a year they will participate in the activity (which therefore implies a certain level of skill and expertise), and 2) the level of personal risk they are seeking from the activity. By segmenting the market, operators can gain insight into important differences in visitor behaviour and focus on the best opportunities for matching their product with the preferred market.

Wildlife viewing is generally not the prime reason for a tourist to select a travel destination. For one-third of operators offering wildlife viewing tours, wildlife viewing was a secondary product.[76] However, there are tourists who choose a destination primarily because of its wildlife viewing. For example, **avid nature enthusiasts** go to the Johnstone and Queen Charlotte Straits for its prime whale watching (Orcas). The **casual nature viewer** is more likely to participate in wildlife viewing as one of several activities offered by a travel destination.

For activities such as whale watching and bear viewing, participants can either stay on land or travel by boat to view the animals. Land-based observers may be slightly more risk-averse, as boat tours increase exposure to adverse weather and water conditions. Boat-based observers are keen on achieving a closer encounter with wildlife and experiencing the environment in which the animals live that may not be accessible by land.

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[73] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-28, The Randolph Group, January 1997.

[74] Major Parks Plan Study – Final Report and Conclusions, p.28, November 1995.

[75] Ecotourism – Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment A Detailed Look at Two Popular Activities: Wildlife Viewing and Cultural Experiences, HLA Consultants and The ARA Consulting Group, 1995.

[76] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.14, 1995.

Market Assessment

Target Markets	▪ The primary markets are non-resident visitors from the US, Europe and Asia. Most of these would be travelling in private or rented vehicles, but there is also a good opportunity here to cater to the bus tour market, something that would be very difficult to do for almost any other outdoor product.
Competition	▪ BC has very good marketability and international renown for wildlife viewing, nature observation and native cultural viewing. But competition within the province is quite extensive. Major wildlife viewing sub-products with a high level of appeal (e.g. whales, salmon, sea otters, grizzly bears, kermode bear, eagles, big trees) are not present in the area or are not available in high enough numbers. The competition for the cultural/historical participant is also growing. In Alberta, especially, the investment in interpretation infrastructure both in the national parks and other facilities (Tyrell Museum, Frank Slide Interpretive Centre, Head-Smashed-In Buffalo Jump) has drawn high market volumes.
Demand	▪ The future demand for all aspects of this product will continue to grow and evolve as increased infrastructure, interpretation and operator expertise bring new and interesting sub-products to market. Demographic trends, including increasing education levels among travellers and the demand for more learning and participative experiences, will favour communities that have made the investment in facility and product development.
Development Factors	▪ Infrastructure requirements will vary depending on what sub-product is being proposed, but in general, more and better facilities will be required than for almost any other outdoor product. This can range anywhere from multi-million dollar interpretive centres to simple viewing platforms. ▪ For wildlife viewing, access and reliability of viewing are key components to the successful development of this product. Shifting populations and the transient nature of some species creates unpredictability in viewing and increases business risk. ▪ Wildlife managers are concerned about the habituation of wildlife to the presence of humans. Not only does this diminish the viewing experience, it can present safety problems, for example in the case of bears. ▪ This product provides an excellent fit with the stated economic and tourism development plans of Golden and Revelstoke. Project-by-project impacts may be modest, but collectively, the job and income benefits could be substantial. This product has the best chance of any product of converting TCH touring travellers to outdoor adventurers.

Resource Analysis

The following resource analysis, for the most part, pertains to natural and cultural features' viewing that takes place in the backcountry. While a high proportion of this activity can and does take place in or near communities, or from highways and major transportation routes, the BC Commercial Backcountry Recreation policy only applies to the use of crown land in the backcountry.

Terrain / Location Factors	- Natural and Cultural features viewing is entirely dependent upon unique or spectacular natural wonders or cultural features and artifacts. If there are clusters of features within close proximity to each other, this would be a great advantage. Features that are close to communities or easily accessible from major transportation routes can facilitate packaging of tourism products.
Infrastructure Requirements	- The infrastructure required to support a "viewing" business would depend primarily upon the mode of transportation being used. All or most participants will require accommodation, and some means of transportation to the sites. - Equipment to support backcountry trips will be required e.g. packs, food camping gear etc., if that is the mode of access to features. - A visible (highway) location with good signage is desirable if drop-in business is a major part of the clientele. - An essential requirement for all successful tourism businesses is a good marketing plan. - It is particularly important to have good guides or interpreters for this activity as a large part of the experience is learning about the features that are the reason (or an important part) of the trip.
Environmental / Wildlife Issues	- A large part of the attraction (perhaps the sole reason) for this activity is wildlife viewing. Encounters with wildlife are sought as the principal end product. Complying with wildlife viewing protocols and code of ethics (non-disturbance) is essential. - Many viewing opportunities will be within national or provincial parks, and national or provincial wildlife management areas. It will be necessary to comply with specific regulations pertinent to these specific areas. - New commercial recreation operations will need to be developed in a manner that is consistent with the interim wildlife guidelines and objectives for commercial recreation.[15]
Access or Land use Issues	- The Golden Recreation Access Plan will provide direction as to the type of recreation activities that are suitable for the landscape units that comprise the Golden portion of the district. - Use of or access over private land will require the permission of the private landowner. - Use of logging roads for access may face conflict with active logging operations. - Where activities occur within provincial Forest Recreation Sites, they must comply with the recreation management objectives established by MoF for the site. - The ongoing process of Native Land Claims may, when concluded, affect the manner in which commercial recreation is undertaken on portions of the land base.
Tenure or Legal Issues	- All commercial recreation activities occurring on provincial crown land require a tenure that is issued by British Columbia's Assets and Land Corporation - Commercial Recreation Policy and Procedures77.

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[15] Ministry of Environment, Lands and Parks, *Interim Wildlife Guidelines for Commercial Recreation*, November, 2000.

	• Commercial activities occurring within National Parks, require the acquisition of a Business License and compliance with National Park regulations[78]. • Tenured forest licensees on provincial crown land are typically part of the referral process for any commercial recreation application within or affecting their forest tenure areas. Proponents will need to work with these licensees. • Commercial activities taking place on Crown Land require appropriate liability insurance coverage.
Capacity or Conflict Issues	• Most wildlife species are highly sensitive to disturbance from humans. Care must be taken not to infringe upon the animals or their habitat, especially during critical nesting or rearing periods. • Conflicts are not that common with other users when viewing inanimate natural features or cultural features. Conflicts are most likely when wildlife are involved.

5.3.10.3 Overall Potential

The overall potential for the development of this product in the Columbia District is very good, primarily in the areas of historical interpretation, nature observation and bird watching. Historical theme development (railway, hydro in Revelstoke, railway, exploration in Golden) has already been undertaken in the communities but could be developed much further. Higher levels of interpretation and alternate programming will have to be undertaken to expand the appeal to already busy touring travellers. Survey data indicates that educational trips are a growing attractant for this group of travellers.[79]

Any development of this product could complement any other outdoor product. For a tourism operator, the ability to include glacier and alpine viewing, wildlife viewing, bird watching, railway interpretation and other related products into a multi-activity package makes for a more marketable trip experience. In the Columbia District, the opportunities for unique experiences are excellent.

Potential Business Opportunities

As part of the development of the Tourism Opportunity Strategy for the Columbia Forest District, tourism workshops were held in the two major communities within the district; Revelstoke and Golden. Key individuals representing a variety of tourism activities and interests, from commercial operators, user groups, community and resource agencies, and members of the public were invited to the workshops. The following table lists the *hiking & natural/cultural features viewing* product ideas that were identified at the workshops. These activities were

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[77] The provincial *Land Act* requires individuals who want to use Crown land for CR purposes to apply for tenure to do so. The B.C. Assets and Lands Corporation (BCAL) issues these tenures on behalf of the Minister of Environment, Lands and Parks.

[78] Parks Canada, *National Parks Act (1988)* and *National Parks General Regulations*.

[79] Ecotourism – Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment Travel Trade Survey Results, HLA Consultants and The ARA Consulting Group, 1995.

combined as it was felt that "viewing" activities normally take place in association with other activities such as hiking. Those that are followed by an *(asterisk) have been fleshed out in detail, including a pre-feasibility market assessment. Some ideas were combined as the focus group felt that there was not adequate capacity in the "stand-alone" ideas to merit business development. Please refer to **Appendix 3** for the detailed workshop results.

Hiking / Natural & Cultural Features Viewing Product Ideas	
Revelstoke	**Golden**
• Tie in with nature walks • Guidebook – link with park guidebooks • Trail construction business • Guided hikes from hotels • B&B specializing in hiking • Combine with interpretation • "Travel Agency" for local opportunities	• Guided interpretive and nature tour hikes • Multi day alpine tours • Wilderness skills / outdoor school *The above three ideas were combined into one product* • Retail outlet • Shuttle service *The above two ideas were combined into one product* • Elder hostels • Retreats (based on themes of music, art, painting, health, meditation, etc) • Lodge *The above three ideas were combined into one product* • Heli hiking

5.3.10.4 Selection of High Opportunity Areas

The motivation for participation in this type of activity is the desire to see and learn about certain types of wildlife species, natural wonders and cultural/historical features. We have described below a number of high opportunity "viewing themes", and then identified some of the best locations where these themes may be pursued (**Figure 10**).

Figure 10: Natural and Cultural Features Viewing Map

Bird watching is a growing leisure activity, particularly with "baby boomers" and seniors. All that is required is a good set of binoculars and patience. A qualified guide can be an asset as well. There are good opportunities to develop bird watching tours in the Columbia District as the Rocky Mountain Trench and Columbia Valley are natural flyways for many migrating birds and waterfowl. Two areas stand out in this regard: *The Columbia River wetlands south of Golden* and *the area south of Revelstoke (airport flats)*. These locations provide particularly good bird watching during the spring and fall migrations.

Waterfall viewing can be undertaken as a means of appreciating the wonderful alpine scenery and forces of nature within the majestic Columbia and Rocky Mountains. Many waterfalls are accessible from major highways and secondary roads, making them available to a large proportion of the touring public. They include some of the highest and most spectacular waterfalls in Canada, and comprise a natural attraction that could be linked with other natural and cultural viewing opportunities. *Takkakaw Falls* in Yoho National Park is renowned for its height and beauty. Others that could be included in a "waterfall tour" are *Wapta Falls* (also in Yoho Park), *Thompson Falls* on the Blaeberry River, *Bear Falls* in Glacier National Park, *Alkokolex Falls* on the Alkokolex River, *Begbie Falls* on, Begbie Creek and *Sutherland Falls* in Blanket Creek Provincial Park.

Wildflower Viewing is another theme that could be utilized as an opportunity for developing a touring business. The abundance of National and provincial parks and accessible alpine terrain facilitates this idea. *Meadows in the Sky Parkway* in Mt. Revelstoke National Park leads to some of the most spectacular alpine wildflower displays in North America. *Keystone-Standard Basin* north of Revelstoke is another area of outstanding wildflowers. Trails in Glacier National Park and Yoho National Park lead to a variety of wildflower displays that change with elevation or season.

Old-Growth Forest Viewing is an opportunity to utilize a rapidly declining asset elsewhere, as a way of attracting people to the Columbia District. Sites like *Giant Cedars Boardwalk* in Mount Revelstoke National Park, *Hemlock Grove* in Glacier National park, and *Giant Cedars Recreation Site* on the Blackwater Lakes Road north of Donald Station are spectacular examples of old growth forest stands. Interpretive trails lead through these groves and explain many of the plants and creatures that depend on old growth forest ecosystems.

Heritage Railway Tours could be developed to take advantage of the nationally significant railway history and features of the Columbia District. The *Spiral Tunnels* and *Kicking Horse Pass National Historic Site* in Yoho National Park, *Rogers Pass National Historic Site* in Glacier National Park, and *Craigellachie* (The Last Spike), as well as the Railway Museum in Revelstoke, could all be linked into an "eco-museum tour" of the living history of the railway.

Alpine History of the Swiss Guides is a theme that has abundant appeal and could provide a basis for a tour that integrates a number of alpine themes. *Edelweiss Village* in Golden is the location of the original homes built by the Canadian Pacific Railway for the first Swiss Guides and their families who settled permanently in the Canadian Rockies, where they were working as mountain guides for the tourists of the railway company and their luxury hotels in Lake Louise, Field and Rogers Pass. The remains of *Glacier House* in Rogers Pass and the intricate trail system that was built by the guides to take clients into the mountains are all a legacy of the fantastic story of the guides. Several of the mountains in the district are named after the guides.

The Fur Trade is another theme that could be utilized to take advantage of the unique history of the Columbia District. *Howse Pass* and the *Columbia River (Boat Encampment)* were used by explorer and fur trader *David Thompson* on his voyage to discover a trading route to the Pacific coast.

Transportation, Mining and Settlement History all provide fascinating stories that could be linked to various historical sites in the district. There are sunken remains of sternwheelers in several locations in Upper Arrow Lake. Abandoned railway lines and other artifacts are evidence of a now bygone era of exploration and development in the region. Several abandoned mines are mute testimony to the struggle for development and survival in an unforgiving landscape.

6.0 Community Tourism Development

The preceding sections of this report have analyzed the supply and demand side issues related to the development of outdoor tourism products and activities in the Columbia District. In this section, the analysis shifts away from activities and onto communities. The implications of development are identified, along with possible strategies for the type of change that is capable of fulfilling economic needs while preserving or even enhancing the quality of life for residents.

The market and trend research suggests that tourism will continue to expand its economic profile in the Columbia District, and, in time, comprise a greater share of the economic base than any other BC region outside of Vancouver/Whistler. The tourism industry and outdoor operators will develop more innovative products, match these to increasingly valuable niche markets and attract the financial and human capital necessary to drive development. Jobs and new sources of regional income will be created. In economic terms, the region will be more diversified and wealthier than it is today. But will it be a better region in which to live, socialize, raise a family, recreate and do business? What costs will communities be willing to bear for these ends?

We have closely reviewed the existing research and the results of our community consultation process in preparing the following discussion. The key community challenges are as follows:

- Building a sustainable tourism economy that conforms to overall community social, environmental and economic goals.
- Supporting this with a land use planning and resource management process that has a legitimate element of local input and control.
- Strategic use of community infrastructure and human resources.
- Industry and network development that maximizes local ownership and control of tourism businesses.

Tourism in the study area remains essentially a small business sector with a high degree of resident ownership and management, and as such, remains a valuable target for community development initiatives. Efforts to support and expand small business should be integrated with efforts to foster and attract businesses of all sizes that are compatible with community and tourism visions for development.

6.1 Development Issues

The outdoor adventure sector is an important contributor to the tourism industry and the economic base of the Columbia District. An increasing number of operators are adapting to the growing demand among tourism markets for outdoor activities by utilizing the local land and natural resource base to expand their operations. Participation rates in most outdoor recreation activities are growing in North America and fueling the demand for more active, educational and learning-oriented outdoor experiences. As a major entry point for Trans Canada Highway traffic, the Columbia District handles a significant amount of total BC visitation in the summer months and is relatively well placed to expand its share of the growing outdoor market. In fact, visitor data for the Rockies region shows a quarter of all visitors have come to participate in outdoor and backcountry activities. We also know that many of the natural features in the area (e.g. mountains, scenery, parks, etc.) have a very strong appeal for the outdoor market, and indeed, for the average traveller.

In spite of the positive trends, travellers tend to spend less time and less money in the region than they do in the rest of the province during their trips. This suggests a close-in, untapped potential for further outdoor adventure tourism development. But the status quo is unlikely to lead communities to a diversified tourism base; otherwise expenditure and length of stay averages would be higher than they are. There are several product, market, service and infrastructure gaps that could be addressed to strengthen tourism and generate the types of economic benefits communities could use. The following list of key issues was identified through research or during the community consultation process for this project, notably workshop and interview program results.

A. ***Target Marketing*** - Outdoor adventure tourism is evolving rapidly and becoming increasingly specialized. Governments, communities and operators who wish to cater more to these markets must understand that their motives for travel are fundamentally different from the typical traveller's motives. The existing tourism industry targets highway touring travellers who are socially oriented – outdoor adventure travellers are attraction oriented and there must be a stronger appeal made to their desire for wilderness, wildlife, parks, learning, nature and physical activity. Catering to outdoor adventure markets means incorporating these ideas in the management of natural resources and the provision of tourist services.

B. ***Visitor Information*** - As travel markets become more specialized, the importance of having access to accurate visitor profiles grows. Operators, communities and policy-makers all need this information if they are to make informed decisions about tourism development in all its forms. Unfortunately, the quality of information about visitors to BC is typically poor with province-wide entry-exit surveys conducted only twice in the last 15 years. Visitor data from travel info centres tends to be passively gathered, biased and unrepresentative of the average traveller. Parks Canada visitor information is generally of high quality but accounts only for park visitors. This leaves a major gap in market intelligence and effectively leaves local areas guessing about their tourism customers.

C. ***Industry Training*** - Communities and industry often underestimate the importance of good tourist reception and overall hospitality skills to the visitor experience. Whether by hotel, park, or guiding staff, consistent standards of service and excellence will payoff tenfold through positive word-of-mouth and travel industry coverage. Getting small business operators to commit to ongoing skill upgrading and training standards will be important for the Columbia District.

D. ***Operator Accreditation*** - At present, many outdoor adventure operators are reluctant to engage in industry certification programs because they do not see a payoff. But outdoor adventurers and ecotourists are facing a growing variety of destination choices and tour companies have limited ability to check on product quality. Unlike most consumer products, which can be directly viewed, the tourism product is often purchased without the usual direct sources of information. As outdoor adventurers have been shown to distrust typical advertising and consumer information provided by the industry, they often search for other signs of value, such as word-of-mouth reputation or environmental group accreditation. Accreditation schemes provide a higher level of consumer assurance of quality and, therefore, a higher level of consumer satisfaction.

E. ***Market and Product Development*** – The demand for the outdoor products that the Columbia District either has or could develop already exists and it is growing quickly. Local success in catering to these markets depends largely on the market and product development skills of local operators. Since the bulk of the adventure travel and ecotourism sector are very small operations, this represents a significant challenge.

F. ***Infrastructure*** - Further infrastructure will be required as a support base for tourism product development. This will come in many forms, from private sector hospitality and supply services to public sector infrastructure (e.g. municipal services, entertainment services/night-life, beautification of town streets, non-motorized shopping areas, etc.) and Crown land access, and it will differ by community. With new public infrastructure, it will be much easier to control backcountry development and to leverage private sector spending.

G. ***Highways*** - The highway system in the Columbia, despite its stature as a major point of entry into BC of the Trans Canada Highway, is poor and a liability to economic development in general and tourism development in particular. With no major commercially scheduled air services, the highways are the sole means of entry and departure for travellers in the summer and the winter (when road conditions are often risky). With frequent road closures during the winter and several high profile traffic accidents in the recent past, any significant expansion in the number of travellers through the region will create logistical problems for tourism operators along with heightened safety concerns.

H. ***Resource Management*** - The limits of acceptable change to the natural environment was questioned by several survey respondents and interview contacts in both Golden and Revelstoke. All human actions in natural areas cause some impact, either positive or negative. The scale can vary quite a bit depending on visitor volumes and frequency, and the nature (type) of the activity. The question that some areas in BC are now facing is how much impact is acceptable? The amount of environmental and social impact allowed is a land management decision, involving the legal and policy environment of the land base, the existing use levels, the desires of the tourists and the larger political environment. Many have expressed concerns that the determination of impact, the assessment of the acceptability of the impact, the management of the impact and the monitoring of the impact are not being done. Given the complexity of these decisions, an open decision structure that allows for input from all interested parties is essential.

I. ***Conflict Management*** - High levels of use, varying recreation goals and finite resources lead to conflict amongst local recreational groups and tourism operators. Competition for access to resources, dispute over activities at a site, and use densities are pivotal issues. It is essential that such conflict be kept to a minimum, so as to avoid tourist dissatisfaction, physical interactions and loss of community support for tourism development. Managers typically use temporal and spatial separation to eliminate conflict. However, some uses are ruled to be totally unacceptable, with access denied. Other activities are allowed within a narrow range of behaviours. The critical management issue is the process used to decide who gets access and when access occurs. Land managers need to understand the diversity of visitors' motives, the outcomes necessary to attain the tourists' goals and the consequences of people interacting with others with different agendas. The community can bridge an intelligence gap between the tourism industry and Crown land managers by supplying locally-based solutions to resource user conflicts.

J. ***Enforcement and Monitoring*** - Policies and programs designed to control backcountry tourism will be ineffective if an enforcement and monitoring system is not in place. It is possible for a small percentage of the visitor population or a small number of operators to have a large and negative impact on the natural and social environment. While this is not a major issue in the Columbia District currently, there are some signs that problems may arise down the road, which could be averted by proposing effective local solutions now.

K. ***Financial Resources***– Tourism is considered to be an export industry because of its ability to earn foreign currency. It is this feature that makes the industry so attractive. However, the flow of economic benefits from tourism does not necessarily benefit the ecosystems on which the tourism depends. This can lead to under-funding, insufficient visitor management and destructive practices such as trail erosion, road damage, wildlife harassment, sewage runoff, and poaching. The erosion of money from government for park management over the last decade is an example of what can happen when budget allocations do not keep pace with management needs. There are numerous instances in Canada, the US and Australia with little or no infrastructure in established parks, much of it in poor repair, some facilities closed due to safety risk and insufficient resources for enforcement. In BC the situation is mirrored across the Crown land base – major land managers such as the BC Ministry of Forests have no mandate for tourism and therefore direct no specific public funds for tourism management. Yet, the outdoor adventure industry is critically dependent upon the long-term viability of the management of the natural environment by government agencies. The inadequate resources for management results in overuse, environmental damage and ultimately the compromising of outdoor adventure tourism potential. It is critical that government recognize that tax-based budgets should fund tourism resource management.

6.2 Development Recommendations

A. ***Implementation*** – One of the risks in preparing development strategies is that issues involving implementation are not given the same attention to detail that went into the planning. Without a commitment to action even the most insightful analyses will be unable to generate the concrete results communities seek in diversifying their economies. There may be a number of underlying causes, from a shortage of resources for implementation to a lack of ownership for strategy recommendations by the community. While this project is funded by provincial agencies, efforts have been made to involve communities at all levels of discussion since it is assumed that the successful development of sustainable outdoor adventure tourism is in many ways driven by local stakeholders. There is reasonably good implementation capacity in the region, with well-established and active economic development offices, chambers of commerce, tourism operators and recreation groups.

Affected organizations should meet with the Ministry of Small Business, Tourism and Culture and Ministry of Forests - to discuss future use of project output, including map products, strategic recommendations and possible areas of assistance for project development. Individual organizations could also identify priority opportunities and areas of potential collaboration within their existing mandates and operating frameworks.

B. ***Tourism Vision*** – There are several economic development and land use planning processes either recently completed or underway in both Golden and Revelstoke that directly or indirectly affect outdoor adventure tourism in the region. These are noted in Chapter 4. Revelstoke included a Tourism Vision Statement in it's 1997 Tourism Development Strategy, however, what has not occurred to date at a district level is the preparation of a cohesive vision or plan that clearly charts a future state for tourism as articulated and agreed upon by the communities themselves. Without that vision, it is impossible to recommend initiatives that may or may not have community support. This report sorts through many of the issues facing outdoor adventure tourism in the Columbia region, and makes some basic recommendations, at a broad, strategic level. It does not purport to be a detailed plan for community action, only a guidepost for future development. Outdoor adventure tourism, which has considerable potential in the study area, is a concept that embodies community-centred planning and control. Golden and Revelstoke should build upon this project, the recreation planning recently completed by the Ministry of Forests and land use planning efforts such as the Golden Recreation Access Plan and the Revelstoke Area Recreation Inventory, by bringing together as many community stakeholders as possible and producing a tourism vision for the region. Areas of action could include:

- Review value and vision-related statements made over the last 10 years from previous community planning exercises. From these can be identified common themes that relate to how tourism development affects the communities and the region. Tourism values can be cross-referenced with areas experiencing development and use pressures.
- Investigate case study profiles from tourism development impacts in other communities and regions to stimulate local discussions about desired tourism impacts, values and visions.
- Use a combination of interviews, focus group discussions, surveys, and community forums to determine whether there are common community values and visions for tourism development.

Case: Dubois, Wyoming

When a local sawmill closed its doors in 1988, residents of frontier-town Dubois quickly organized a public workshop to determine how they could rebound from the loss of their largest employer. The group decided that rather than try to attract a new industry, Dubois needed to diversify its economy in a way that leveraged its most abundant assets – wildlife and wild lands. Today, the Dubois economy is a healthy mix of ranchers, hunting and fishing guides, wilderness outfitters, tourism-oriented businesses, and entrepreneurs who have relocated to the area because of its scenery and recreational lands.

The mill's closure may have actually helped Dubois by forcing residents to prepare for the future. In 1993, the community received a significant economic boost with the opening of the National Bighorn Sheep Centre, a cooperative project financed by Dubois residents, federal and state agencies, conservation organizations and local economic development groups.

Despite its successes, Dubois was not without its problems. There has been an influx of newcomers in search of small-town values and beautiful scenery and along with it has come new investment in the city's downtown. Some citizens began to worry that growth would lead Dubois down the path of its upscale neighbour, Jackson Hole. After a widely attended community workshop a series of citizens' committees were formed to work towards the goals that were established. Initiatives included a downtown revitalization, land use planning, architectural guidelines for homes and businesses, affordable housing and a mapping exercise focusing on the most important wildlife habitat in the region.

The key to Dubois's success may lie in its refusal to follow the traditional economic development textbook for rural communities and instead trying to find economic opportunities that allow it to build on its existing assets.

Source: Balancing Nature and Commerce in Gateway Communities, Jim Howe et al, 1997.

C. ***Community Cooperation*** – There are a number of organizations actively engaged in community economic development and tourism development in the Columbia District, but only a limited amount of joint planning takes place, even though there are some issues that could be effectively dealt with at a regional level. This is particularly true of outdoor adventure tourism, where activity is dispersed over the regional land base, and where there tends to be a lot of common land use, resource management, infrastructure and market issues. Collaborating and identifying initiatives of mutual benefit could improve the planning environment and save resources. Possible areas of cooperation include:

- Shared research on sustainable tourism concepts, land use planning, community involvement and market information.
- Themed product development
- Trail and tourism infrastructure coordination
- Operator and industry networks.
- Design and delivery of training programs.

D. ***Gateway Development*** – Golden is currently one of three communities in BC approved for MSBTC's Park and Backcountry Gateways Program. Program funding is available for one year and is usually targeted at specific project developments and labour assistance (e.g. a tourism coordinator). Budgeted expenditures are set forth in a business plan prepared by the community. Competition for the program funding is understandably intense, and although Revelstoke's potential for true gateway development would seemingly qualify it for support, the likelihood of funding is poor because it is so close to Golden. Therefore, collaboration between the two communities regarding gateway initiatives would be beneficial.

E. ***Community Support*** – Gaining community support for outdoor adventure tourism is important to minimizing the negative aspects of growth, one of the cornerstones of sustainability. In Golden and Revelstoke the planning literature over the last 10 years makes frequent reference to the lack of support for tourism among community leaders and stakeholders. This may be attributable to any number of factors including:

- Residents are often against tourism fearing an influx of tourists and their interests, and the possibility of being exploited by the larger tourism interests and their concerns.
- Competing resource users and land managers often see any increase in recreation and tourism as a threat to their own interests and livelihood.
- Tourism is frequently categorized as a creator of low-paying seasonal jobs that somehow cannot contribute to a community's economic base.

All tourism needs local support, but particularly nature-based tourism, as it is so often linked to community involvement. Considering that the attractions and the features most valued by tourists are also prized by the community, tourism operators must strive to involve the community in project planning, and vice versa, the community must work with the tourism industry to ensure community values and interests are incorporated in the development process. Areas of action could include:

- Working with councillors and other elected officials to understand the growing importance of tourism to the local economy. According to the Ministry of Finance, tourism is the second-most important private sector contributor to the local economic base in both Golden and Revelstoke; of the 63 communities studied in the province, only four had a higher degree of dependence on tourism than the Columbia District. An annual report card on the progress of tourism development in the region, identifying and tracking project developments and communicating these to media contacts and stakeholders could be prepared.
- Alternatively, a "tourist in your own town program" program could be launched. In Golden, this could be an extension of the "Golden Welcome" program and its local marketing component.
- Establishing a community consultation network consisting of community groups with an interest in outdoor adventure tourism development. Ideas on projects and policies can be fed into the community through the network, tapping into the skills and expertise of committed individuals. The objective would be to determine outcomes and not generate "talk-fests".
- Identifying opportunities where major industry (e.g. forest companies) can collaborate with tourism operators on tourism projects.

Case: Traversee de Charlevoix

Traversee de Charlevoix is a Saint-Urbaine, Quebec-based company which provides cottages for hut-to-hut hiking, and these have suffered vandalism, in part because of other users (hunters, ATV and snowmobile users) feeling their own activities are threatened. Their approach has been patient, and diplomatic, involving discussions around the fact that all users should be able to co-exist. They offer other user groups the use of their log cottages (which previously suffered from vandalism and destruction). This encourages all users to share a sense of ownership. The company knows that this is a long-term challenge for them, with a number of problems to overcome. For example, in order that hunters not feel a sense of conflict, and vandalise company property, they have agreed to refrain from using the area in autumn, and leave it to hunters. They hope that in the future, the rights of all users at all times will be respected. To assist in mutual understanding, they are trying to recruit staff that come from the areas with the most vandalism, to create alliances, and to promote regional pride. They feel that when the entire population understands the benefits that tourism brings, as well as understands the costs of vandalism, that significant progress will have been made toward this.

Source: Catalogue of Exemplary Practices in Adventure Travel and Ecotourism, Pam Wight and Associations, 1999.

F. ***Visitor Information*** – Understanding visitors and their motivations for travel is the most important subsystem of any community tourism marketing program. Successful tourism programs require a strong market orientation. The needs and wants of the tourists the community wants to attract and serve must be the focus of much of the marketing and development activity. Therefore, it is important to clearly understand which tourism market segments are to be attracted and served. Tourists in general, and even outdoor adventure visitors, fall into a very diverse set of categories with quite distinct needs and wants. Presently, the quality of visitor information available to marketers in the Columbia District is quite poor, as indeed it is for the province in general. A priority should be placed on improving identification of the different types of tourists, or market segments that Golden and Revelstoke presently serve or would like to serve. Neither Tourism BC's Visitor 97 profile information nor Travel Info Centre visitation statistics are suitable datasets for structuring a local marketing program. Communities in the Columbia District have only a loose understanding of the customers of their second largest industry.

Parks Canada's treatment of visitor data may be a model for communities to follow. At one time, Parks in the Rockies collected very little visitor data. In the 1990s anecdotal databases were constructed and gradually transformed with a succession of surveys focusing on highway and backcountry visitors. Today, their visitor profile has a strong empirical base and is far superior to anything available on non-park visitors.

One or more data collection approaches might be considered:

- A visitor survey which would identify the size and nature of the existing market and asks basic questions about primary market segments, origin of visitors, use of local businesses and facilities, reasons for visiting, their source of information about the community and their level of satisfaction with their trip. Such a survey was conducted by summer students in Golden in the summer of 1992 and generated very useful market information. While a variety of methodologies could be used (mail, self-administered, telephone) personal interviews may be most practical, though not inexpensive. Visitors can be interviewed as they are leaving attractions or accommodations. The literature offers numerous visitor survey guides.

- A simple database on customers and survey results can be built and used to target marketing programs.
- A market survey (e.g. by telephone) also could be conducted among households in a regional target such as Calgary.

Case: Wilcox Arizona

The Willcox, Arizona Chamber of Commerce and Agriculture knew that they had to take some positive, aggressive steps to stimulate business in the Willcox area. Their final decision turned out to be not only creative, but also successful.

Using a simple visitor questionnaire, the Willcox Chamber discovered that many of the tourists visiting and staying in Willcox were from rural areas in the Midwest. Such visitors felt Willcox was unique because it so closely resembled a Midwestern farming town, but was located in Arizona's mild climate. According to Chamber manager Ellen Clark, "We found that over half the visitors stopping at the Chamber office for information have a rural farm interest or background. They are the ones the area really seems to appeal to."

In response to this information, the Chamber decided to concentrate its limited tourism budget on promoting Willcox to rural residents of the Midwest. Chamber tourism chairman Dick Seidel proposed a "Spend a Fun 'Farmer's Holiday' in Sunny Arizona" ad that was run in a Midwestern farm magazine. The ad was jointly sponsored by the Willcox Chamber of Commerce and the Arizona State Department of Tourism.

To aid the visitors when they arrive, the chamber developed a self-guided tour of area farms and ranches and a brief fact sheet on the economics of local agriculture. According to Seidel, "We've decided to target our advertising rather than use the shotgun approach."

To supplement this advertising, the Chamber developed a "Stay a Day in Willcox" packet that tourists can pick up at various locations around town. It is actually a folder with pockets containing single-page descriptions of historical sites and scenic areas, along with good directions to help newcomers visit these areas of interest. The packet also includes biographic sketches on the area's Chiricahua Apaches, Apache Chief Cochise, and Indian agent Tom Jeffords who lived near Willcox in his days of glory. A biographic sketch of favorite son Rex Allen is included, along with directions to the Rex Allen Museum. The packet contains maps of Willcox and the surrounding area, and self-guided tours of the Willcox area that tourists staying in Willcox can complete in one day.

Expensive, you say? The packet is financed entirely by advertising on the folder.

"We have found that the packet is less expensive than a color brochure and is much more effective," explained Chamber manager Clark. "It gives much more information on the area, and individual sheets can be pulled or added in tailoring the packet to the individual tourist's needs. The packet has gotten much greater response than our prior brochure."

By identifying its differential advantage and the needs of its customers, Willcox, Arizona, has now begun to benefit from its marketing efforts. These activities take time, effort, and money, but they can result in better efficiency and a greater economic reward for the entire community.

Source: Marketing the Uniqueness of Small Towns, WREP 57, Michigan State University Extension.

G. ***Human Resources*** – There are a variety of human resource development issues that affect outdoor adventure tourism development, from basic hospitality training, to guide training, to language skill development, to management skill development programs. Communities can increase the local benefits of tourism development if operators are able to obtain their staffing and training needs locally. Personnel trained locally are more likely to be aware about local environmental, social and economic issues and be advocates for the region rather than just the business itself. Other issues include:

- Access to affordable, flexible training is often a major problem for small operators and their employees. While there is a reasonable capacity for training through the college system and the Revelstoke Skills Centre, programs sometimes do not suit the needs of target clients.
- Use of widely available SuperHost tourism training and SuperHost community programs could be increased.
- Promotion of tourism career opportunities to youth and new labour force entrants could be expanded. Young entrepreneur programs (e.g. You BET, Junior Achievement) could have a role, as could training partnerships with operators for innovate approaches like a guide mentoring program.

Case: Esprit Rafting

At Esprit Rafting of Pembroke, Ontario most staff are paid by the days they work. Usually training courses are done during days off. The company reschedules to ensure staff are not missing their share of workdays. They provide free food and accommodation for staff during training courses plus a discounted rate for their course. They pay tuition fees in advance for staff to be deducted from their "staff book". Salaried employees get their regular salary whether they are working or training.

Source: Catalogue of Exemplary Practices in Adventure Travel and Ecotourism, Pam Wight and Associations, 1999.

H. ***Industry Networking*** – Building business networks and linkages can generate significant economic development opportunities as well as cost savings for outdoor adventure businesses. As tourism is a people-oriented industry, most operators are fairly social and appreciate the opportunity to get involved in the community and meet their peers. The more vigorous the network, the more likely operators are to be competitive and generate positive economic benefits for the community. Better workforce training linkages, the establishment of mutual infrastructure (e.g. trail systems), the development of a local supplier network, and cooperative marketing are some of the achievements possible through network development. The sharing of strategic planning information, from outlining key business objectives to explaining the obstacles in building critical social and economic ties to the community can especially benefit operators with limited business development capacity.

Operators could be organized in both official and unofficial networks. Official ones include the chamber of commerce, land use committees, economic development committees, conservation groups and other community organizations. Unofficial networks can be loosely organized coalitions of operators and suppliers who together can cooperate on building products and packages. The operator database compiled for this project could be used to prepare a tourism product guide for the Columbia District.

Case: Niagara Nature Tours

Niagara Nature Tours operates on the Niagara Peninsula offering a wide range of art, science and nature based tours from hiking and walking excursions to motor coach and van tours. The company maintains files of all the local events and always asks guests if they would be interested in attending that event. Whenever possible, they try and keep their tours to areas off the beaten path. Their invitation is *Come and explore Niagara's outdoors, Discover its secret places.* Therefore the places they try and go to are places, restaurants, fruit stands etc. that only local people generally know about – and sometimes not many of them are even aware of certain special places. Their cultural programming tries to include as many local artists as the client will be willing to pay for.

Source: Catalogue of Exemplary Practices in Adventure Travel and Ecotourism, Pam Wight and Associations, 1999.

I. ***Quality Control*** – The last 20 years have seen a dramatic rise in consumer awareness of the concept of product quality. The private sector has found that high-quality products are demanded by consumers and are an important component of market advantage. A widespread problem in outdoor adventures tourism is the assurance of information accuracy, of quality interpretation, of levels of safety, of operational integrity and of adherence to impact rules. Consumers look for such assurance, and any deficiency in these areas may inhibit use.

There is no rating system in place for informing tourists about the quality of experience provided by operators. The 1997 Visitor Study showed a significant number of travellers to the Rockies were less than highly satisfied with the value for money they were getting on their trips. Many visitor markets do not mind spending more money if they can be assured that they will receive quality services and experiences in return. The accommodation industry has a basic system in place through the BC Accommodation Guide program, but no such system exists for outdoor tourism operators. Those operators who provide a poor quality experience to travellers hurt the reputation of the entire tourism industry. Peer standards can be defined by local tourism operators as the minimum required standards for a quality experience.

At present there are few standards regarding guide qualifications or insurance for many types of guided activities. Some industry segments, such as rafting, are self-regulating, but most others are not. Even in a self-regulating system there is nothing to prevent an operator from outside the industry to "open shop" and not follow the existing guidelines. The lack of standards is of particular concern for higher risk activities like backcountry hiking and skiing.

The October 1997 edition of *Backpacker Magazine* recommended a guide to participant ratio of one guide for every five participants for activities in remote locations or involving high risk.

Although it is not widespread in Canada or BC, accreditation of eco-certified tourism operators and lodgings will become more than a passing phenomenon as the industry and travel markets mature. The certification trend is sweeping through the forest industry and similar events will occur in tourism as the availability of travel options increase and travellers find it more difficult to ascertain whether or not their purchases conform to their own nations of sustainability. There are a handful of programs available and some jurisdictions like Australia (considered the world leader in ecotourism planning and accreditation) have formalized nation-wide industry standards and programs. However, many of the programs have overlooked one of the key issues supposedly addressed by ecotourism, that being local control and operation. The very notion of certification should be scrutinized as much as the operations themselves because if it is not implemented wisely, it could jeopardize the ecotourism it intends to foster. Another criticism of the certification process is that "certifiers" sometimes lack certification themselves. Communities may be able to assist in accreditation research and encourage their tourism operators to develop and maintain sustainability programs.

Case: Manitou Sand Hills

Although Saskatchewan has no province-wide regulations for ecotourism outfitters, there were guidelines created by the residents of the Manitou Sand Hills area (about 150 miles from Saskatoon), which set a fairly high standard for other areas to consider as a base. These guidelines have been developed as part of a Land Use Plan for an area of about 110,000 acres of crown land. The approach essentially combines resource, visitor, and impact management, through tourism operator guidelines. The area has a range of activities related to agriculture, recreation and oil exploration and development. The guidelines were developed by a mixed group representing government, farmers, and local agencies. They consulted with affected parties during this process. The applicants must turn some revenues over to a local authority to spend on "the environment" and must be accredited with the Saskatchewan Watchable Wildlife Association, which reviews ecotourism operations to ensure responsible practices and conduct. Their guidelines relate to:

- Code of ethics
- Educational responsibility
- Environmental impact
- Measures to protect flora and fauna
- Cultural sensitivity
- Other considerations

Source: Planning For Success In Sustainable Tourism, Pamela A. Wight, 1996

J. ***Product and Market Development*** – As the outdoor adventure market grows and matures, it will become less homogeneous and more specialized, forming niches with distinct travel characteristics. As this occurs, community and small business operators will be forced to streamline and specialize their marketing approach, making it easier for visitors to obtain the value-for-money experience they seek. A visitor's tourism experience while in the region is essentially determined by the product or activity being delivered by the operator. A quality product is synonymous with a positive visitor experience. There are measures a community can take to influence product and market development by working with stakeholder groups, government agencies and tourism operators.

Communities can contribute to overall tourism development by establishing their own market position. A clear statement of their position within the competitive tourism market place can guide marketing and other development programs. Marketing resources tend to be scarce so conventional community advertising should always be closely examined to determine what is working and missing, and how marketing could be improved. It is important that the community fully understand what it has to offer, how it stacks up against other communities, what the targeted customer is really looking for, and how to reach and meet those needs.

The presence of national and provincial parks is a catalyst for tourism regionally, affecting both marketing and product development. The tourism industry can leverage park features into their own advertising even if they do not actually do business there. On the product side, the parks motivate business relocation and expansion, as they are often perceived by operators to have good recreation features and high marketability. Any operator contemplating non-motorized backcountry products in the Columbia District should be aware of the parks' role in regional tourism. **See Appendix 5 for information on Parks Canada Business Parameters.**

The literature is full of best practice information and case studies of successful, community-oriented ecotourism development. Communities can fulfill a service by making these information sources available to the community at large and tourism operators. A "Best Practices" manual for distribution to new operators, particularly those from outside the community may also be of interest. It could outline the benefits to the community and the operator of good practice fundamentals and techniques for changing, designing and testing new products.

Some products such as river rafting and heli-skiing may be nearing their commercial and capacity limitations in the district. Communities can work with government agencies and operators to direct new investment into products and areas with more growth potential.

Innovation and change are bywords of tourism product development. Rather than simply reproducing products that can be purchased elsewhere, the emphasis should be on developing unique combinations of activities and experiences that define the region's market presence. One way to enhance product development is by piggy-backing on major developments such as the Kicking Horse resort.

Packaging assistance can improve product marketability and distribution for smaller operators who might not normally have the capacity to engage in sophisticated distribution practices, for example through tour wholesalers and travel agents. Through packaging, operators can create innovative products by pooling their ideas and resources, while visitors have a simplified purchase decision and the chance to experience a unique holiday. The challenge for the community is to create a cooperative environment in which operators see a payoff for participating. The more who participate, the better the opportunities for package development. Areas of need include:

- Operator training in package design, perhaps through a local workshop.
- A pilot project involving several operators for a package promotion into a nearby market such as Calgary.
- An inbound tour operator capable of multi-activity packaging and marketing.

Some survey respondents suggested more cooperative marketing could be undertaken in the Columbia District. A cooperative marketing group, utilizing programs from the Canadian Tourism Commission (CTC) might be feasible. Several CTC programs (e.g. Regional Tourism Marketing Initiative and the Adventure Program) could be utilized locally, providing a consortium of interested stakeholders was formed.

Case: The Conservation Lands of Ontario

Significant provincial funding cutbacks led to the birth in 1997 of The Conservation Lands of Ontario (TCLO), an alliance of five Conservation Authority partners (Halton Region, Hamilton Region, Grand River, Long Point Region, Niagara Peninsula Region and soon Toronto Region). With limited funds available, ancillary services (such as nature interpretation and education) had to become self-sustaining, and were to operate on a cost recovery basis. As a result, most of the province's Conservation Authorities commenced to explore non-traditional and innovative means to make their ancillary service programs sustainable. During this adjustment period, several of the Conservation Authorities recognized that, if they pooled their resources, they could create a more forceful presence in the market place. Capitalizing on the Canadian Tourism Commission's (CTC) innovative Product Club Program, the Conservation Authorities combined their resources with those of compatible private sector partners and formed TCLO Product Club in 1997.

Since its inception, TCLO Product Club program has developed partnerships with about 50 organizations (primarily private sector partners) to create and promote a range of new adventure, culture and nature tourism products and services. The overriding goal of the Product Club is to become a model for the cooperative development and marketing of sustainable tourism products in urban fringe areas. In this context, TCLO seeks to deliver new, "soft" adventure packages that promote quality experiences and lifelong learning with respect for the environment.

TCLO has positioned itself within the Product Club organization as a focal point for distributing information to the public. It also acts as a liaison between visitors, tourism associations, accommodation providers, travel outfitters and other suppliers interested in using Conservation Authority (i.e. Crown) lands for environmentally friendly tourism pursuits.

Since its inception, TCLO has received much praise from both the media and the travel industry for environmental initiatives it has undertaken with its members. This exposure can only serve to increase the leverage the organization has in influencing the long-term environmental practices of its partners. TCLO eventually hopes to implement a recognized accreditation program to certify the sustainable practices of its members.

To reinforce the importance of sound environmental practice, TCLO has developed an agreement for tour operator partners that wish to use Conservation Authority lands for their trips. The agreement outlines TCLO's sustainable tourism policies, to which tour operators must adhere. The policies include a requirement that tour operators abide by certain etiquette (e.g., remain on marked trails, abide by conservation area regulations); monitor and report to TCLO any environmental problems or damage encountered during their visit; submit five percent of their gross tour income to TCLO when using non-gated conservation lands; and respect other groups using the lands (The Conservation Lands of Ontario Tour Operators Agreement 1998). The agreement also compels tour operators to educate themselves and their customers about the rules and regulations associated with proper resource use and appropriate behavior on TCLO lands.

TCLO's marketing strategy has evolved as the Product Club has matured. Initially, it focused on very generalized communications with consumers and the travel trade. However, as it has gained a better understanding of market demand, it has established more specific marketing goals and priorities. The marketing strategy presents TCLO as a product brand that promotes reconnection with nature and spirituality, escape from the urban landscape, and the opportunity to experience "a sense of place" (Bruno 1998). Associated with this product brand are experiences and messages emphasizing environmental and cultural awareness. For instance, TCLO has developed its own bottled water product. It is labeled with the TCLO logo and an environmental message. A percentage of all bottled water sales is reinvested in environmental projects associated with such activities as tree planting and wetland preservation. Similarly, TCLO has developed and published "44 Country Trails", a popular hiking trail guide of the Conservation Authority Lands. This guide promotes recreational activity in the conservation lands, educates the community and tourists about the natural and cultural history of the area, and provides advertising for sponsors and product club members. Currently, TCLO is working on its second trail guide book, which will promote the Country Trails of Gray and Bruce Country.

Finally, TCLO seeks to stimulate economic diversity in surrounding communities through product development with local private sector partners. These partnerships help to increase the quality and range of products that local entrepreneurs can offer in the marketplace, thereby enhancing their chances of long-term viability. Indirectly, the partnerships will also increase the economic and social benefits flowing into local communities.

Source: "The Conservation Lands of Ontario and The Henry of Pelham Family Estate Winery", Elisa Martin, in a Protected Area in On Route To Sustainability: Best Practices In Canadian Tourism, 1999.

K. ***Land Development*** – Outdoor adventure business development can be stimulated by providing timely and accurate information to entrepreneurs and investors about the availability of land resources. This may be serviced municipal land and buildings needed as a base of business, or it could be Crown tenure for a backcountry area in which to conduct tours. In either case, helping operators navigate through local and senior government red tape will stimulate new investment and reflect positively on the community's business climate. Initiatives could include:

- An inventory of municipal sites suitable for conversion or new development.
- A tourism investor's handbook, which would provide a step-by-step guide for dealing with the regulatory process, but particularly land, use issues. Tourism BC is currently preparing a manual, which could be easily adapted for local use.
- A backcountry site guide that identifies the highest value tourism activity areas, using map resources generated by this study as well as the Golden Recreation Access Zoning Plan and Revelstoke Area Recreation Inventory. The maps could be modified and printed in such a way as to direct visitors and operators to those areas deemed most acceptable for use.

L. ***Service Development*** – There is growing potential for services and rentals targeted at unguided users and commercial operators who may choose to lease rather than purchase their equipment needs. These intermediary opportunities are a result of rising demand by recreation consumers as well as more sophisticated clustering of tourism service businesses. Community action could include:

- Promoting retail and service opportunities and gaps to local businesses and entrepreneurs. An opportunity listing of retail enterprises that do not currently exist in the community but for which there might be enough visitor demand to support a business could be compiled and promoted to facilitate opportunity development. Population thresholds needed to support various small tourism businesses could be prepared. Such an assessment would help local entrepreneurs identify development opportunities that could be supported by resident and travel markets, as well as make them aware of areas or markets where there may be too much development and competition.
- Identifying rental and shuttling opportunities in support of product development. Examples of equipment that could be covered include mountain bikes, motorboats, kayaks, canoes, fishing gear, snowmobiles, skiing equipment and possibly climbing equipment. Expansion of rental equipment would benefit both local residents who wish to try an activity on a limited basis and visitors to the area who are unable or do not wish to bring recreation equipment to the area.

Case: Gwaii Haanas

In response to concerns about vandalism of old Haida village sites, the Haida Nation and Skidegate Band Council initiated the Watchmen Program in the early 1980s for the Gwaii Haanas/South Moresby region of Haida Gwaii (Queen Charlotte Islands). Today, the Watchmen Program is an integral part of the Strategic Management Plan of Gwaii Haanas, a National Park Reserve. This program protects the Haida's culturally significant sites and the sensitive environment of the National Park Reserve, gives benefits to neighboring communities and provides a unique experience for visitors to the area.

Guidelines have been developed for the Watchmen, for visitors and for commercial users of Gwaii Haanas. Those developed for the Watchmen deal primarily with setting an appropriate example for visitors, including behaviour in regards to the use of drugs and alcohol at the sites and hunting and fishing. With input from the Watchmen, Parks Canada developed a handbook for visitors. Much of the information is similar to that provided verbally to visitors by the Watchmen and is given to visitors at a mandatory pre-trip visitor orientation. The handbook provides a code of conduct for those visiting sensitive sites, including the Watchmen base camps; appropriate behaviour and guidelines concerning animal species such as seals, sea lions and whales as well as seabird colonies; etiquette to follow while in Haida Gwaii with regards to camping, garbage and human wastes; and information on hazards and personal safety.

The number of visitors allowed into the Gwaii Haanas National Park Reserve has been limited by establishing visitation quotas. Presently, all tour operators must pay an annual fee of $60 to obtain a license from the AMB before entering the park reserve. A voluntary Code of Conduct was developed in 1989 between commercial tour operators, charter boat owners, professional resource guides and the Haida Watchmen. This document includes guidelines on general etiquette; behaviour towards wildlife and at archaeological, cultural and historic sites; visitor safety; and practices regarding food gathering, garbage and camping. The Code of Conduct also emphasizes local involvement by hiring local people, buying supplies and material from local businesses and participating in local events. At present, 26 commercial operators are licensed by Parks Canada, which grants the licenses for one season. Enforcement of the licensees is based on an honor system and is therefore very informal. Watchmen encourage tour operators to obtain a license before entering a site. Generally, there have been no problems. However, a few commercial operators, who were repeatedly but unsuccessfully told to acquire a license, were eventually prohibited from accessing the sites. The AMB can revoke a license if the regulations set out by the Code of Conduct, National Parks Board and/or the AMB are not followed. The widespread spirit of cooperation and support for the Code of Conduct among the commercial tour operators has been the source of its continued success. If tour operators do not comply with the Code, they are identified and shunned by other operators or excluded from a network of information.

Source: "The Gwaii Haanas Watchmen Program Sustainable Tourism Development", Karen Hoese, in a Protected Area in On Route To Sustainability: Best Practices In Canadian Tourism, 1999.

M. ***Infrastructure*** – The design and placement of infrastructure is a powerful community tool for controlling and directing tourism development. Tourism is a small business-oriented industry and requires extensive investments in infrastructure – this applies even to wilderness operators who might be relatively self-sufficient but still require key transportation and supply networks to support their tourism products. The community can influence backcountry use directly through public infrastructure placement and indirectly by encouraging and shaping private infrastructure (e.g. hospitality services).

The key infrastructure considerations for **Revelstoke** are:

- As with all other aspects of outdoor adventure tourism and ecotourism planning, community infrastructure should be directed within a broader community development planning framework. A vision of a desired future state of backcountry tourism is essential for guiding strategic initiatives such as infrastructure. Without this, the community will never be sure that its decision-making is leading toward and contributing to community goals.
- Boat ramp, fuel service and marina facilities on Upper Arrow and Revelstoke lakes for enhanced fishing and motorized boating access. Although there is some canoe/kayak activity on both waterways, by and large they are not highly suited toward non-motorized markets.
- Services and amenities (e.g. washroom facilities, clean drinking water, garbage disposal, camping and shower facilities, parking, firewood, signage and visitor information) targeted at experienced rock climbers at Shaketown and Blanket Creek and at Begbie Bluffs for lesser-skilled climbers. The coordination of strategic infrastructure with an indoor climbing facility and instructional services right in Revelstoke could create a "critical mass" of features to make the area a climbing centre.
- Access and parking for ski touring areas for longer-term development. This activity has become very popular in the parks in recent years and visitors may be forced, or inclined, to utilize non-park areas once they perceive capacity limitations are being approached.

Case: Columbia River Gorge

In 1986, the Columbia River Gorge was declared a scenic area by the US federal government. A partnership initiative was instituted to protect and support the economy of the Gorge by encouraging growth to occur in existing urban areas and by allowing future economic development outside these areas if it was compatible with Gorge resources.

One outcome of the multi-stakeholder partnership involving all levels of government and the private sector was the development of the Crate's Point Interpretive Complex. Upon completion, the Crate's Point Interpretive Complex will have created an interpretive center of national stature, serving as a tourism destination, and providing a boost to the local economy . It will include a Historical Museum, which will display the artifacts and heritage of a county which once stretched eastward to the Continental divide, the Oregon Trail Living History Park, created to celebrate the 150th anniversary of the Oregon Trail and to depict life in the region during the mid-1800s, and the Columbia Gorge Discovery Center, which highlights the geological, ecological and cultural attributes of the Gorge.

An active five-way partnership among the Forest Service, the County, the Historical Museum, the Columbia Gorge Commission, and the Citizens for the Gorge Discovery Center has brought privatization to this venture to an unusual extent among projects utilizing federal funds.

Source: Columbia River Gorge National Scenic Area: Interagency Agreements and Regional Marketing, Case Studies of US Forest Service Initiatives with Rural Communities.

The key infrastructure considerations for **Golden** are:

- The opportunities for infrastructure development in Golden are positive because there are several local areas with high quality recreational features that are very close in to town and adjacent to the Trans Canada Highway. It is possible to undertake several hard and soft "backcountry" activities in a single day without having to travel more than 15 minutes between locations. However, the potential is undeveloped or under-utilized because of the lack of infrastructure and services. The challenge will be to coordinate development sensibly and sustainably.
- The Welcome Centre, which is being planned for Golden, will provide numerous opportunities for tourism marketing and product development. The facility could serve as a unique exploration and staging area that brings the natural features, amenities and infrastructure of Golden into a conveniently accessible interpretive setting. The Centre could:
- Offer interpretive displays illustrating recreational opportunities in the area.
- Disseminate maps, product/activity guides, rules of acceptable conduct and land use information to self-guided visitors.
- Direct visitors to those areas where higher use levels can be accommodated (i.e. in accordance with in-place infrastructure and zoning guidelines of the Recreation Access Plan).
- Distribute operator information and packages for guided backcountry tours.
- Distribute hospitality information that free independent travellers can use to obtain their lodging, food service and other trip needs.
- Market downtown services and amenities.
- A nordic ski centre has potential for development in the West Bench area. Excellent terrain and conditions, proximity to Kicking Horse resort, proximity to core services in Golden, opportunity to cross-market to downhill skiers and opportunity to catch spillover from the neighbouring parks make for a favourable resource and market environment.
- Signage, parking, campsites, trail upgrading and other amenities for non-motorized multiple use on the West Bench could accommodate a variety of day-use activities, including mountain biking, hiking and nature observation/sightseeing. Mount Seven would be a second choice for more extreme adventures as new amenities could be shared by mountain bikers and para-gliders.
- Strategic development of camping, pull-in/take-out sites, trail system, perhaps with suitable hardened sites (e.g. boardwalks and viewing platforms), and interpretive signage at the Columbia wetlands for multi-activity use (e.g. hiking, wildlife viewing, recreational/day paddling, interpretive tours).

Case: Iowa Welcome Center

Faced with an aging rest area along its Minnesota border, Iowa's Department of Transportation (DOT) and the Department of Economic Development's Division of Tourism sought ways to remedy the situation. Tourism is the third largest industry in Iowa, critical to the local and state economy. It was imperative that the facility in question--expected to serve upwards of 600,000 travelers this year alone--make as strong an impression as possible on tourists entering the state.

The Department of Transportation's initial review determined that it would cost approximately $4 million to upgrade the current rest area, or $6.5 million for a new facility--a costly endeavor either way.

That was when the "Top of Iowa Welcome Center," a local nonprofit corporation, stepped in. Its proposal was simple: more and better services for $2.5 million at a new site with lower annual operating costs.

The group's plan called for the consolidation of the current rest area (which had facilities on both sides of the freeway) and the addition of a welcome center for tourists. By moving the facility off the highway, just off a pre-existing exchange, it was able to greatly reduce costs by avoiding the mandates of the Davis-Bacon Act.

The nonprofit corporation managed the entire project on behalf of the DOT and Division of Tourism. It handled everything from the hiring of architects through the construction, and it manages the facility, which opened in June. The group worked closely with private organizations interested in setting up business in the new center, getting feedback on the overall design and layout of the facility. This resulted in a more attractive and efficient site plan, enhancing the site's commercial appeal.

The agreement between the state agencies and the nonprofit provides for a thirty-year management contract. In addition, the nonprofit retains possession of excess real estate the state had purchased. The nonprofit is allowed to sell or lease this land to help offset its construction and operational costs.

Looking to the future, the nonprofit installed a water/sewer infrastructure for commercial and industrial development, with the hopes that businesses would begin to locate in the vicinity of the new facility. The group projected it would take two years after the site's completion before any business would show interest. There already has been so much interest and demand for the location, however, that one business has already committed to locating near the facility, and several other commitments are pending. A consortium of farmer-owned cooperatives has purchased 19 acres and is creating a farm-theme development around the welcome center.

The county benefits from the project through increased sales and property taxes, and employment opportunities for county residents. The county is also excited about having a greater range of stores and businesses in the community, greatly reducing travel time for many residents seeking shopping opportunities within the county.

To date, several agencies in several other states have contacted the Iowa DOT about the project. There have been no complaints about moving the rest area off the freeway, and between 75 and 80 percent of the rest area visitors take the time to visit the welcome center/gift shop. In addition to rave reviews from the public, sales in the gift shop are running three to four times their projected levels and many feel that it is the "finest rest area they have ever seen."

Source: "Partnerships in Recreation and Tourism", Intellectual Ammunition, September/October 1998, Heartland Center for Leadership Development.

N. ***Infrastructure Funding*** – Public and private infrastructure funding should go hand-in-hand, ideally in step with a coordinated plan. But public resources are difficult to come by and tourism's private sector is generally not that well financed. Possible funding options for new infrastructure include:

- User fees.
- Special taxes (accommodation, equipment, rental, guided services).
- Foundations / trusts (for specific projects).
- Partnerships between public agencies and private corporations.
- Concessions.
- Special event fund raising / donations.
- "Adopt-a-XXX" (trail, event, public feature or facility) for maintenance and upgrade.
- Federal and provincial government programs (e.g. FRBC, CBT, MELP's E-Team).

There are positives and negatives to each funding source – the best option is usually measured in relation to community recreation and tourism development plans.

O. ***Resource Management*** – As backcountry use in the Columbia District expands, some stakeholders and operators are saying it is important to determine the carrying capacity of natural areas to appropriately plan, manage and control the direction and consequences of tourism and other activities. The problem, however, is that outside of wildlife management, the concept of carrying capacity has trouble dealing with the complexity and diversity of issues associated with outdoor adventure tourism. Programs are now focusing on managing the resource, the visitors, and the impacts, rather than carrying capacity. Potential methods include:

Site management – hardening sites, channelling use and building facilities to draw traffic away from sensitive or undisturbed areas.

Direct regulation – zoning use either spatially or temporally, increased enforcement, restricting activities and restricting intensity of use.

Indirect regulation – user fees, manipulation of access and infrastructure, and education.

Some of the above strategies are being explored in Golden as part of the Recreation Access Plan, which is contemplating both zoning and access controls to promote tourism, maintain local recreation opportunities, and preserve important wildlife habitat for the future. This process is somewhat unusual in the province and is unique for its community-driven focus. Revelstoke has made a good start by completing a detailed Revelstoke Area Recreation Inventory, but should institute a similar planning process to help with commercial recreation development in its region. If the Golden process is successfully implemented with the support of the community and industry, it will undoubtedly create a better environment for tourism planning, but it still represents only a first step in moving toward sustainable tourism.

Instances where community action could complement existing resource management initiatives include:

- Coordinating community infrastructure investments around sustainability objectives. A boardwalk system at the Columbia Wetlands, for example, could add significantly to tourism product development by encouraging multi-activity packaging. If done properly, such a development would minimize visitor impacts and protect the ecological integrity of the site.
- Requesting that provincial agencies increase their surveillance and enforce compliance of visitor activity within the existing guidelines. The size of the landscape, extensive number of access and entry points, moderate levels of use and lack of available staff may prevent action at this time, future enforcement measures may be needed as recreation and tourism pressures increase. BCAL has recently hired an enforcement officer to patrol commercial activity in the Sea-to-Sky corridor, where there are significant problems with unlicensed guiding.
- Ensuring that the community is part of the planning process to implement BCAL CR tenures and MoF forest development plans. Having articulated tourism and recreation planning directions and guidelines, communities should be involved in the monitoring process to ensure government agencies are following through in their decision-making. A committee representing stakeholder groups could meet periodically to work with key agencies and review plan compliance and effectiveness.
- Developing visitor education programs including the dissemination of information about use areas (e.g. maps), acceptable codes of conduct, ecological principles and minimum impact practices. Even if zoning controls are implemented in the region, many visitors, especially those on self-guided trips, may be completely unaware of the rules and regulations. The community can play a vital role in communicating to travellers what these are and what forms of behaviour are deemed acceptable on the land base. This will effectively enhance both the visitor experience and tourism business development, as outdoor adventurers and ecotourists increasingly seek out communities enacting sustainability principles.
- Promoting the adoption of local codes of practice by operators and recreation groups. This could begin with an assessment of best practices from other jurisdictions.

Case: Boardwalk in the Valley of the Giants

The Valley of the Giants in south-west western Australia is a forest that contains the unique red tingle tree and Gondwana invertebrate relics. The trees, which are many hundreds of years old, have the biggest diameter trunk of any eucalypt. The popular site, which has over 140,000 visitors in 1991, was suffering from the impact of all these people. A maze of tracks led to the trees, which were trampled around their bases by the visitors, compacting the soil and damaging the trees' shallow root systems. The level of visitation was also disturbing the leaf litter that is the habitat of some unique Gondwana invertebrates.

A series of boardwalks has been developed, including a Tree Tops walk and the Ancient Empire Boardwalk. The walks are curved to harmonize with the surrounds and enhance the visitor's sense of discovery as they are drawn around each bend. Interpretive signs are included, and contemplative rest points and lookout platforms have been strategically placed, utilizing the natural vegetation.

The boardwalks succeed in keeping visitors off the forest floor and provide additional interpretation and understanding of the site, creating new tourist experiences. Commercial tours may utilize this attraction and help pay for park management through their permit fees.

Source: Ecotourism A Practical Guide for Rural Communities, Sue Beeton, 1998.

P. ***Backcountry Tenures*** – Many comments about commercial backcountry recreation policy in BC were submitted by workshop participants and interview respondents contacted over the course of this study. Generally negative, the comments expressed frustration over delays in processing applications for tenure and methods used to award them. As BCAL and the CR policy itself are relatively newly established, a period of learning and adjustment is to be expected as programs and policies are implemented. Similarly, commercial operators who previously dealt with MELP and other tenuring guidelines have had to adapt to this new environment. As the logistics of CR tenure get ironed out, it is becoming apparent that it is not only backcountry tourism operators who are being affected by the new rules, but communities themselves. It is important that community development considerations and criteria be built into the permitting process so residents have a reasonable say in the pace and direction of licensed commercial recreation activities. The following is an area of concern:

- Ensuring community input and values are factored into the approval process for commercial recreation tenure. This could be as simple as participating in the BCAL referral process or devising more direct intervention, for example by incorporating community development criteria into the adjudication process. BCALC could include assessment guidelines similar to those in the Ministry of Forests' Small Business Forest Enterprise Program (SBFEP) assessment guidelines. For Section 21 value-added timber sales, bidders are given higher scores if they will process the timber in the local community. A similar approach for commercial recreation tenure would ensure that prospective operators carefully consider doing more business in communities nearby the operating area.

Survey

Tourism Opportunities Study – Operator Survey

The Columbia Forest District has been selected by the Ministry of Small Business, Tourism and Culture (MSBTC) for completion of a Tourism Opportunity Strategy (TOS). We are seeking your input as a local tourism operator in the completion of the TOS for your area.

A TOS is a study sponsored by the MSBTC – with partner agencies - to (i) update inventory information on current tourism/ecotourism operators in the study area and their key geographical areas of interest/use, and (ii) to examine a region's potential for further development in the ecotourism sector. The study is undertaken at a regional level, usually a forest district, to coincide with other land use planning processes and resource management agency boundaries. The information derived from a TOS is shared with several groups. Crown land managers are provided the updated inventory information so that they can include tourism interests in their own land management and development planning processes. Local economic and tourism development agencies use TOS information to assist with tourism marketing and economic development efforts. Finally, MSBTC will use the TOS results to support planning decisions by all agencies affecting the tourism industry. On completion of the TOS, the final report and data will be made available through MSBTC and the local regional tourism association.

This survey is a critical component of the TOS and is undertaken on behalf of the Ministry of Small Business, Tourism and Culture (MSBTC) by a consulting team led by Future Legacy Consulting Group. The survey is comprised of two parts: Part I (questions 1 – 5) assists in updating tourism operator and resource inventory information; Part II (questions 6 – 9) seeks your input and opinions on key issues affecting ecotourism development in your region.

Please answer only those questions that apply to your business.

Organization Name____
Contact____
Mailing Address____
Physical Address (if different from above)__________________________
City, Prov________________Postal Code__________Phone__________
Fax__________E-Mail______________Web Site________________

Part I :

1. If your company is a:

- Accommodation facility/property manager ☐, proceed to # 2.
- Tour operators (coach, adventure, etc) ☐ proceed to #3.

2. **If you are based in or use the district** and offer **overnight** accommodation facilities, please indicate for each type of facility you operate, the following information.

Type of Facility	Hotel / Motel	Hostel	Cabins	Lodge / Resort	Fishing / Guide Camp	**Bed& Breakfast**	Backcountry Lodge/Cabin	RV Park / Campground
rooms								# Campsites with hook-ups
beds								# Campsites with no hook-ups

3. What are the **primary activities** provided by your operation in the district (Examples include: snowmobiling, fishing).

4. What are the **secondary activities** provided by your operation (A secondary activity would not be supplied without the presence of the primary activity. A secondary activity does not have to be guided, e.g. wildlife watching, camping).

5. Please indicate the location of the **key geographical areas**; **resources** (i.e. trails); **and/or natural features** (i.e. waterfalls); that you frequently use in your operations on the map provided. (NB: This information will be shared with crown land managers so that they are aware of individual tourism operators' geographical areas of interest for agency consultation and referral purposes.)

Would you like the above information (responses to Questions 1 – 5) to be provided to your regional tourism association for marketing and tourist referral purposes ?

YES _____ NO ______

Part II :

6. Please indicate the number of people that you will employ in 2001 for the operations in the district for the following categories:

	Full time year round
	Full time seasonal
	Part time year round
	Part time seasonal
	Total employees (persons)

Do you employ local residents? ☐ Yes ☐ No

If yes, how many of the above employees would be local residents __________?

7. What are some of the key issues affecting tourism development in the Columbia Forest District? You may wish to consider some of the outstanding strengths of the region, or perhaps factors, which are impeding or threatening further development. Table 1 provides some suggestions to assist with your response.

Table 1: Possible Issues and Opportunities for Tourism/Recreation Development

Natural features (e.g., mountains, lakes)	Resource/land use management or policy	Community attitude to tourism
Recreation features	Local availability of required supplies & services	Market and demand conditions
Seasonality or weather	Hospitality/amenities in nearby community(s)	Competition
Cultural or historical features	Accessibility from nearest community	Availability of capital
Current degree of development or utilization	Proximity to other attractions	Local/regional skills/labour market
Carrying capacity	Local economic development initiatives or office	Local/regional training capacity

____

____

____

____

8. What do you feel are the best new potential tourism development opportunities in the ecotourism/adventure travel sector in the Columbia Forest District?

9. What do you believe should be done to encourage further development in the ecotourism and adventure travel segment of tourism?
Are there specific actions you would like to see undertaken in your district?

APPENDIX 2 – Columbia District Operators (List)

Columbia District Tourism Operators	
Golden	**Revelstoke**
Swiss Village Motel	Monashee Outfitting- Porcupine Lodge
Golden Gate Motel	Boulder Mtn. Chalet
Golden Rim Motor Inn	Sale Mtn Backcountry Hut
Arl Inn Towner	Best Western Wayside Inn
Packers Place	Griffin Lake Mountain Lodge B&B
Mary's Motel	Pioneer House Bed and Breakfast
Sanctuary Wilderness Retreat	Powder Springs Inn
Rocky Mountain Rafting	Columbia Motel
Ponderosa Motor Inn	Glacier Park Resort
Sander Lake Campground	Glacier View B & B
Sportsman Motel	Sandman Inn (Revelstoke)
A Quiet Corner B&B	Frontier Motel And Restaurant
Rondo Motel	Hidden Motel
Columbia Valley Lodge	Regent Inn
Rocky Mtn. Trench Discovery Centre	Selkirk Mountain Experience
Great Canadian Heli-Skiing -	Revelstoke Alpine Adventure Company
Rondo Motel	Silvertip Aviation
Timber Inn	BCFS Recreation Site - Carnes Creek
Mclaren Lodge Bed & Breakfast	BCFS Recreation Site - Pitt Creek
Kapristro Lodge	BCFS Recreation Site - Potlatch Creek
Harbart House Bed & Breakfast	BCFS Recreation Site - Sprague Bay
Beaver Foot Lodge	Big Eddy Sales and Rentals
Selkirk Inn Ltd.	MacPherson Lodge
Whispering Spruce Campground & Rv Park	Mica Creek Mtn. Village
Whitetail Campsites	Mulvehill Creek Wilderness Inn and B&B
Brookside Motel	Williamson Lake Campground
Triple C Riding	Peaks Lodge
Golden Tourism Association	Adventure Tours and Rentals
Super 8 Motel (Golden)	Hi-Country Mountaineering
Station Ave. Backpacker's	BCFS Recreation Site - Eagle Bay
Golden Snowmobile Club	Selkirk Tangiers Heli-Skiing
Sorcerer Lodge	Tundra Helicopters
Hillside Lodge, Chalets & B&B	Canadian Helicopters
Goat Mountain Lodge	Mountain Light Tours
Donald Station Campground	Revelstoke Snowmobile Society
Country Comfort Bed And Breakfast	Cat Powder Skiing - Mt Mackenzie
Wet & Wild Adventures	High Country Cycle and Sports
Goldenwood Lodge	Hillcrest Hotel
Golden Village Inn	Mt. Revelstoke and Glacier National Parks
Degagne Trailer Court & Rv	Revelstoke Travellers Hostel & Guesthouse
Doroshuk English Ent.	Revelstoke KOA

Frontier Village Glacier Rafting Golden Alpine Holidays Golden Municipal Campground Blaeberry Mtn. Lodge Golden Mountain Adventures Best Western Mountainview H.G Parson House B & B Heather Mountain Lodge Heritage Caboose Bed & Breakfast Kicking Horse Canyon B & B Kicking Horse Mtn Resort Partnership Ltd. Kinbasket Adventures Kinbasket Lake Resort Mountain Ridge Motorsports Ltd. Golden Edelweiss Chalet Rocky Mountain Ranch Resort Purcell Heli -Skiing/Hiking Whitetooth Ski Society Rocky Mountain Motel Rocky Mountain Log Chalet Mistaya Lodge Redburn Valley B & B Quantum Leaps Sister And Beans Guest House Places Less Travelled Adventure Realm Canada Alpenglow Aviation Alpenrose Cabins And B&B Alpine Meadows Lodge Alpine Rafting Prestige Inn	Revelstoke Snowmobile Club Revelstoke Railway Museum & Museum Store Revelstoke Outdoor Sports Wilderness West Adventures Inc. Base Power Sports Canyon Hotsprings BCFS Recreation Site - Tangier River Bergmann's Roost Boulder Mountain B&B Inn and Hostel Wintergreen Inn Stone Castle B&B Daniel's Hostel Guesthouse Christmas Island Bed & Breakfast Apex Raft Company Canada West Campground 7 Acre Woods B&B Columbia Mountains Nature Tours Ltd. Loop Brook Campground Illecillewaet Campground Smokey Bear Campground Downie Rv Resort AP Mountain Adventures Swansea Alpine Services Summit Cycle Tours Lamplighter Campground Glacier House Resort Four Seasons Manor Grizzly Tours Inc. Great Canadian Snowmobile Tours Alpine Lane B&B DNR Performance Nelles Ranch Bed And Breakfast Selkirk Mountain Helicopters Ltd. Revelstoke Snowmobile Tours Bertz Outdoor Equipment & Café Thunder Ridge Trail Rides and B&B Super 8 Motel (Revelstoke) Enchanted Forest Best Western Glacier Park Lodge
Banff	**Parsons**
Canadian Mountain Holidays - Revelstoke Canadian Mountain Holidays - Kootenay Canadian Mountain Holidays - Gothic Lodge Canadian Mountain Holidays - Adamants Lodge Canadian Mountain Holidays-Monashee Lodge Kootenay Park Lodge	Windigo Sled Dog Adventures Quinn Creek Campground Wells Landing B & B

Field	Canmore
Emerald Lake Lodge Lake O'hara Lodge Kicking Horse Lodge Fortress Lake Lodge Hallmark Hotel Cathedral Mountain Chalets Yoho National Park Twin Falls Chalet	Blanket Glacier Chalet Alpine Club Of Canada
Nelson	**Lake Louise**
Shelter Bay Provincial Park Blanket Creek Provincial Park Martha Creek Provincial Park	Kingmik Expeditions West Louise Lodge
Calgary	**Other**
Wiskyjack Hostel	Great Canadian Off-Road Tours Mountain Spirit Adventures Mummery Glacier Use Area Kinywik Winter Camp

APPENDIX 3 – Workshop Results & Pre-feasibility Assessments

Golden Product Ideas

Snowmobiling

Product Ideas:

- Destination snowmobile lodge with access to remote backcountry areas
- A snowmobile trail grooming and maintenance business (including sign and trail map maintenance)
- Remote trail fuelling stations with temporary shelters that can provide hot food service, portable washroom facilities)
- Snowmobile terrain complex

Snowmobiling

Product Description:

Snowmobile terrain Complex (location for related special events)

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• West Bench as a possible location • A site should be 5 – 10 minutes from town • Site must have a variety of terrain (ups, downs, flats)	• Typically would have a club to run it but could be a business • On site would need to have concession, washroom facilities, storage, parking, etc.	• Would attract a cross section of users • Market could draw from a 500 mile radius • Facility could run also seasons (in summer with ATVs, motor cross, etc)	• Necessary permits/licenses • Wildlife • Noise • Water • Pollution • Zoning • Liability insurance • Access • Conflicting use

Overall Potential – Good

- Snow conditions are favourable as are market conditions and participation rates.
- However, the growth potential is in snowmobile touring rather than play areas.

Competition – High

- Broad choice of destinations are available across the province.
- Province-wide trail network will improve access to quality terrain in affected communities, but it will also increase participation.
- Revelstoke has established itself as a snowmobile destination and will be seen as a preferred locale for regional sledders.

Business Development – Community cooperation

- As in Revelstoke, the cooperation of local snowmobilers is essential as it will be difficult to justify the investment in facilities on a strictly commercial basis. Any development in an area like the West Bench would automatically attract local users and may conflict with other possible uses (e.g. cross-country skiing).
- Developing trails in co-operation with off-season users such as hikers, mountain bikers and horseback riders is also possible.

Keys to Success – Good equipment and access to quality terrain

- Ensuring trails are well-maintained by working with local snowmobile clubs and associations.
- Having access to high quality resources.
- Improving infrastructure and hospitality services to encourage longer and more frequent trips.
- Working with government and tourism agencies as well as environmental groups to develop and promote the trail systems.
- Developing a code of conduct for safety and environmental concerns which is strictly adhered to.

Complementary Activities:

Special events
Repair and maintenance services
Sales and rentals

Comments:

This product would require an year round facility that could accommodate other sport activities that require a terrain complex (Mtn biking, dirt biking, motor cross).

Snowmobiling

Product Description:

Remote trail fuelling stations with temporary shelters that can provide hot food service, portable washroom facilities)

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Possible sites are Quartz, Gorman, drainages for shorter routes • Long distance service areas would be Bush River and Spillimacheen, Golden to Invernmere • Servicing sites would have to be no further than 100 km from parking lots	• Groomed trails • Snow cat to town portable fuelling equipment • Portable shelters for provision of hot food • Portable washroom facilities	• Locals • Any snowmobilers using area where service located • Alberta/ Pacific NW • Large emphasis on families	• Environmental issues • Permits/Licenses • Pollution • Solitude issues

Overall Potential – Good

- Snow conditions are favourable as are market conditions and participation rates. New infrastructure that encourages longer stays, including potential overnight and multi-day trips will appeal to the touring market which is expanding in BC.

Competition – High

- Broad choice of destinations are available across the province.
- Province-wide trail network will improve access to quality terrain in affected communities, but it will also increase participation.

Business Development – Community cooperation

- Linkages to BCSF's community trail network would enhance potential.
- New tour development into the backcountry would have to take careful account of safety factors. As use increases there is increased danger related to natural occurrences such as avalanches.
- The potential for user conflicts with heli-skiers and backcountry skiers may also arise if use areas overlap.
- Some form of user fees may be required to offset the associated costs. This will present challenges in terms of fee collection for both self-guided users and, potentially, commercial operators.

Keys to Success – Quality trails and infrastructure

- Ensuring trails and facilities are well-maintained by working with local snowmobile clubs and associations.
- Improving infrastructure and hospitality services to encourage longer and more frequent trips.
- Working with government and tourism agencies as well as environmental groups to develop and promote the trail systems.
- Developing a code of conduct for safety and environmental concerns which is strictly adhered to.

Complementary Activities:

- Guided tours
- Training/orientation/education services
- Provide shuttle service for other activities (ski tourers, ice climbers)
- Access to summer backcountry activities such as mountain biking, hiking, ATV riders

Comments:

- This product would have to be coupled with a number of other services to enhance its economic viability.

Ski Touring

Product Ideas:

- Guiding ski touring services
- Providing access by snow machine to remote backcountry areas (shuttle service) for ski tourers
- Backcountry accommodations (hut to hut system, temporary structures)
- Development of guide book, guide/accommodation booking service

Ski Touring

Product Description:

Guiding ski touring services

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
▪ Use terrain in National Parks ▪ Good variety of terrain (beginner to expert, treed to alpine) ▪ Variety of access options (from roads, helicopter drop points) ▪ Good snow pack conditions ▪ Solitude – non-motorized areas	▪ Roaded access ▪ Backcountry huts and cabins ▪ Front country food /accommodation services	▪ Beginner to experts ▪ Canadian, USA and International clientele ▪ Market demand is annually increasing	▪ Requirement for certified/licensed guides ▪ Avalanche hazards ▪ Wildlife conflicts ▪ Conflicts with other users ▪ Access to large areas of varied terrain

Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain.
- Infrastructure is well developed in Alberta Rockies.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost.

Human Resources – Highly qualified guides.

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.

Business Practices – Average revenue potential, low returns.

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of $230,122 in 1993, with about 50% bringing in less than $50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately $100. This is believed to be a good representation of the BC sector as almost one half of all operators in the country are based in BC.
- Most operators offer a mix of day-trips and overnight trips with preset packages the norm.

Business Development – Appeal to participants, beginners and niche markets

- Telemark skiing will become increasingly popular as will the overall market for nordic skiing. This will create demand for good beginner instruction and also increase the importance of the accommodation and other facilities in attracting the broader market. Specific niche markets such as women-only clinics and tours have good potential for expansion.
- As user fees becomes more prevalent in backcountry areas, more operators may begin working with recreational skiers and clubs to maintain and enhance high quality areas.
- Providing courses packaged with rentals and guided tours will encourage beginners and casual participants to participate.

Keys to Success – Quality terrain and equipment, remote but safe experiences

- Good access to high quality terrain, including permits/tenure for secluded backcountry areas.
- For the destination-based traveller, high quality accommodation and support facilities. If specialized target markets are being attracted, then developing menu and accommodations have to be designed accordingly.
- High-quality, well-maintained equipment, with a variety of sizes suitable for the family market.
- Ability to answer questions from both beginners and experts on equipment and trails in the area.

Complementary Activities:

- Development of temporary or permanent backcountry accommodations (tents/yurts, huts/cabins/lodges)

Comments:

- There are currently a number of professional guides operating out of Golden who have guiding businesses.

Ski Touring

Product Description:

Development of a Hut to Hut system with temporary/portable structures

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Areas that are accessible without helicopters in the winter • Less technical/flatter terrain • Solitude / wilderness areas • Valley bottom to alpine areas	▪ Development of temporary / portable accommodation facilities ▪ Low cost means of supplying and accessing facilities	▪ Advanced beginners to advanced intermediates ▪ North American wide market	▪ Conflicts between same and differing user groups ▪ Environmental issues (water, human waste, wildlife) ▪ Licenses, tenures

Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain and destination status, and numerous lodges targeting the destination-oriented ski tourer.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost.

Human Resources – Highly qualified guides and hospitality personnel

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.
- Huts will require additional personnel for maintenance and supply.

Business Practices – Average revenue potential, low returns

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of $230,122 in 1993, with about 50% bringing in less than $50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately $100. The average ski tour operator does not generate enough revenue to justify lodge/resort investments.
- Huts will add to the capital cost of a ski touring operation and necessitate the development of all season products to justify the added investments and improve returns. For developments on Crown land, the form of tenure is an important consideration. Huts on Crown land outside of parks are often erected by recreation clubs who have been licensed for such development by the Ministry of Lands. There is no exclusivity of access to or within the huts to facilitate public access. Commercial use is considered unethical unless the operator reimburses for that use or otherwise contributes to maintenance and upkeep.
- There are few instances of hut development on Crown land by commercial operators because of problems associated with vandalism and unauthorized use by the public. As huts would be usually be constructed on an existing trail, access would be available to all trail users. Even if a private operator constructed new trails for a hut or hut system, BCAL is likely to authorize such development through a Licence of Occupation, which would still allow public use of the trails and access to the hut (although the hut itself could be locked). This lack of exclusivity is likely to deter future commercial hut development.

Business Development – Coordinated system and policies

- As noted in the previous product idea, the expanding market for ski touring is attracting more soft adventurers to the sport and leading to more niche development. Services and products targeted at beginners, families, women and casual participants will enhance market potential.
- These markets are also looking for relatively good accommodation and food services compared to the hard adventurer who is just as likely to camp than stay in a hut or lodge.
- If a hut system is established, facility managers and users must establish clear guidelines for acceptable use and activities and the extent to which they can be done in the area supported by the huts. They must follow practices that minimize the impact on the environment.
- Capital costs can be kept low by choosing to provide minimal amenities that only need replenishment once in a while, or arrange for regular transport of supplies into the hut, either by motorized or non-motorized means.

Keys to Success – Quality ski terrain, quality accommodation

- All the elements of high quality ski touring should be present, including access to high quality terrain, a secluded, wilderness experience and quality guiding.
- For hut systems, clearly identifying the purpose and role of the hut is important so visitors understand what experience they are getting. The term hut has different meanings in North America and Europe and should always be qualified by the operator.
- For hut systems, an operator who is able to work out user-agreements with local recreationists, perhaps for shared-use in some situations, is more likely to gain their acceptance and cooperation, thereby reducing vandalism and conflicts.

Complementary Activities:

- Guided tours
- Society run huts
- Shuttle services
- Accommodations / food services in Golden
- Health spas

Comments:

- Golden currently has a substantial number of backcountry accommodations in the region. However, there is still room for expansion in the hut-to-hut touring accommodation sector, especially if the structures are temporary and can be moved to new different locations each year.

Cross-Country Skiing

Product Ideas:

(A number of ideas were developed and then clustered into three potential products).

- Local nordic ski trail development based out of lodges and Bed and Breakfasts which might be linked to one another by a ski trail system
- Loppets / ski marathons and other special events
- Development of a long distance nordic ski trail system

Cross-Country Skiing

Product Description:

Development of a long distance nordic ski trail system

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Requirement for a large, flat area with good snow conditions (west side of valley) • Road access to at least one end of the trail system • Possible sites include the West Bench, Holt Cr. To Donald	▪ Groomed trails ▪ Warming hut facilities ▪ Parking areas ▪ Signage and maps ▪ Fee collection and sales area ▪ Ski patrol services	▪ Beginners to advanced skiers ▪ Local and regional (AB, BC, Pacific NW) ▪ Down hill skiers from Kicking Horse Resort ▪ Increasing market ▪ Develop nordic destination (i.e. Sovereign Lakes at Silverstar)	▪ Access to private/ crown land ▪ Tenures/licenses permits ▪ Coordination with Kicking Horse Resort to provide nordic component ▪ Wildlife issues

Overall Potential – Moderate

- Long-term participation trends have been holding steady, but for communities with sound investments in infrastructure and services, business has been increasing. Cross-selling to downhill skiers has proven effective in other areas. Multi-activity development may be necessary.

Competition – High

- There are many well-established cross-country ski areas in BC and Alberta that offer similar terrain features and snow conditions and in some cases have superior infrastructure and amenities. Canmore, Kananaskis and Sunshine Meadows are nearby competition for valuable Calgary market. Well-developed downhill and resort infrastructure further down the Columbia Valley in Invermere and Radium is also a strong source of competition..

Business Development – Appeal to soft adventure markets

- Families with children value good instruction for both the children and adults, activity areas specifically for younger participants, good ski rental facilities in terms of equipment quality and size selection and dining facilities catering to families. Couples will value not only the facilities and trails for the ski activity itself, but the overall ambience of the area, including dining and accommodation.
- A potential area would have to be thoroughly researched and planned to ensure there is the right product/market mix. The initial focus would be on identifying potential locations for trails, assessing the feasibility of each (what type of skiing?), and deciding what is needed to develop and maintain the trail system.
- Cooperation and participation of local outdoor clubs is essential.

Keys to Success – Central location, easy access, multi-activity

- Cross-country ski areas are being transformed into multi-use, winter playgrounds or resort areas to appeal to broader markets. There is unlikely to be sufficient demand for solely cross-country unless other activities are factored into the development.
- While natural features such as varied terrain are important, the built environment is critical – that means things like night lighting, parking, clear signage, high-quality and well-maintained equipment, transportation services and the availability of multi-activity packages can really broaden the appeal.
- A nordic centre will not catch on in a big way unless there is extensive grooming on the trail system, perhaps using snowmobiles to pull small groomers. If trails are groomed skiers can count on good conditions and so will be more willing to drive to the area for a day or weekend.
- Trails for skiers could be utilized in the summer and off-seasons for hikers, bicyclists, horseback riders for connecting various components of a site. But trails would have to allow the user to view and visit a variety of ecological and natural features.

Complementary Activities:

- In the shoulder and summer season, trails can be used for other activities such as hiking, horse back riding, mountain biking.
- Provision of accommodation and food services.

Comments:

- The activity of cross-country / nordic skiing is growing. Potential for nordic centre to tie in with the new ski resort development at Kicking Horse.

Cross-Country Skiing

Product Description:

Local nordic ski trail development based out of lodges and Bed and Breakfasts which might be linked to one another by a ski trail system

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Flat area, with good snow conditions • Trails (minimum of 5 km from door step) • Road accessible • Relative proximity to other lodges/ B&B's	▪ Track ski trails based out of lodge / B&B ▪ Accommodation and food services	▪ Families ▪ BC, AB, Pacific NW ▪ Increasing growing market	▪ Marketing and coordination with other lodges/ B&Bs ▪ Linked, groomed and maintained interconnecting trail system ▪ Tenures / licenses, permits

Overall Potential – Moderate

- Long-term participation trends have been holding steady, but for communities with sound investments in infrastructure and services, business has been increasing. Cross-selling to downhill skiers has proven effective in other areas. Multi-activity development may be necessary.

Competition – High

- There are many well-established cross-country ski areas in BC and Alberta that offer similar terrain features and snow conditions and in some cases have superior infrastructure and amenities. Canmore, Kananaskis and Sunshine Meadows are nearby competition for valuable Calgary market. Well-developed downhill and resort infrastructure further down the Columbia Valley in Invermere and Radium is also a strong source of competition.
- Offering skiing as a secondary activity connected to other outdoor pursuits would enhance the market potential.

Business Development – Develop a unified activity area

- Unless there was enough cooperation among facilities to development an accessible system of trails for all visitors, then the concept would be too piecemeal to be marketable. Importantly, a funding mechanism would have to be formulated and accepted by participating facilities.
- A critical mass of facilities would have to be identified and coordinated because the chances of gaining the commitment of all facility owners in a given area are low.

Keys to Success – Central location, easy access, multi-activity

- Cooperation among facilities in terms of access, grooming, signage, maintenance and marketing.
- Any trail system for skiers could be utilized in the summer and off-seasons for hikers, bicyclists, horseback riders for connecting various components of a site. But trails would have to allow the user to view and visit a variety of ecological and natural features.

Complementary Activities:

- Joint marketing and promotions, information coordination and sharing
- Summer trail rides, hiking, mountain biking
- Wildlife viewing
- Support of providing an array of activities and services in Golden area
- Development and maintenance of WEBSITE

Comments:

- The Golden area currently has a number of lodges / B&B's operating in the area providing this product. However, there is no joint marketing, and product development. Potential exists to greatly enhance this product with current resources and infrastructure.

Mountain Biking

Product Ideas:

- Mountain bike shuttle with food service
- Mountain bike and road riding tours, with additional services of bike rentals
- Provision of maps, guide books, etc
- Marketing, promotion and hosting of races, competitions, eco-challenge and other special events
- Heli-mountain biking

Mountain Biking

Product Description:

Mountain bike shuttle with food service

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Road access to trail networks • Trail networks • Mount Seven is a existing shuttle need location	▪ Vehicle and trailer ▪ Roads ▪ Trails	▪ Moderate to high end mountain bikers ▪ Local and regional residents ▪ AB, BC, Pacific NW ▪ Guests at lodges, motels, hotels and campgrounds	▪ Motor Carrier license ▪ Appropriate permits ▪ Forest Service agreements ▪ Liability insurance

Overall Potential – Moderate

- While there is growth in mountain biking, most users have their own bikes and transportation, and prefer convenient access to trails where shuttling would not be necessary or where users with more than one car can perform their own shuttling. Still there may be enough demand for a shuttling service if it catered to all forms of outdoor adventure sports.

Business Development – Multi-activity service

- Potential areas of business development include:
- Providing services for multiple activities including hang/para gliding, biking, canoeing, kayaking and climbing.
- Coordinating expediting services with heli and fixed-wing air services to remote, backcountry areas.
- Providing shuttling services to commercial operators.
- Offering the service to sports/rental stores, accommodation facilities and other sales venues for day trips by self-guided visitors.
- Developing the service in conjunction with maps and guide books visitors may need to undertake self-guided tours.

Complementary Activities:

- Provision of shuttle service to other recreation activity users (i.e. at Mt Seven for the hand and para gliders).
- Coordination of special events, races and competitions.
- Mountain bike tours and rentals.

Comments:

- This could be a viable business if coupled with another product such as tours and rentals.
- A market need for a shuttle service currently exists at Mt. Seven.

Mountain Biking

Product Description:

- Mountain bike and road riding tours, with additional services of
- Bike rentals
- Provision of maps, guide books, etc.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Mountain bike trails, logging roads, paved highway • Areas that are not busy with other trail users (i.e. hikers, horseback riders) • Limited areas within National Parks where mountain biking on trails is permitted	▪ Retail outlet ▪ Maintained trails ▪ Accommodation and food services ▪ Trail maps and signs	▪ Families and young adults ▪ AB, BC ▪ Clients from other tourist sector in community ▪ Expanding undeveloped market	▪ Conflicts with other trail users ▪ Licenses and tenures ▪ Conflicts with woodlot operators ▪ Environmental impacts of mountain bikes

Overall Potential – Good

- The potential is good for the mountain biking product in the Columbia. BC is growing in popularity as a mountain biking destination and demand will continue to rise. The lack of destination status and facilities for either touring or mountain biking limits the potential across all markets, although there is ample resource potential for expansion.
- Multi-activity packages and tours will be necessary for attracting more touring visitors.

Competition – High

- Competition is high for the mountain biking participant, regionally and provincially. Squamish, Whistler and the North Shore Mountains of the Lower Mainland are considered by enthusiasts to be among the premier mountain biking destinations for extreme free-riding. Facilities are well developed in many places around the province. In Canada, there are no comparable areas to the US mecca of mountain biking, Moab, Utah.
- It is fairly easy to respond to any rising demand for biking because the business is not capital intensive and services can easily be an add-on feature for existing operators who might be offering other products (providing operators have access to trails). A large number of outdoor adventure operators offer cycling as a secondary activity.

Business Practices – Low revenues, excellent returns

- The average Canadian bicycling tour operator had annual gross revenues of $151,541 in 1993, with 55% bringing in less than $50,000 annually. The gross margins are among the highest of all outdoor activities, averaging 31.9% due to significantly low operational expenses. The average number of visitors per operation was 250, trip length was 5.6 days, and per day revenues approximately $115. These averages include both cycle touring and off-road participants.

Business Development – Superior trail system, close in infrastructure

- Mountain biking and tour operators will need to collaborate with the local accommodation industry and other tourism providers to support their product. Packaging with other guided activities will extend the reach to soft adventurers. Developing commercial ventures in the study area will be a real challenge because it is often convenient to engage in unguided activities. With an extensive network of maps, guides and on-line resources, most visitors can gain a thorough understanding of biking options on the Internet. The key will be providing convenient support services (shuttling, rentals, repair, accommodation, meals, interpretation) to convert these participants to buyers of a value-added product.
- Trails can either be developed separately for each activity such as mountain biking or for shared use. The development of shared-use trails in co-operation with other user groups is more cost-effective in using a limited, common land resource.
- One option is to utilize ddownhill ski areas which can provide easy access to the alpine and allow for use of ski trails. A mix of purpose-built biking trails (gnarly trails with more obstacles) would be attractive to extreme enthusiasts. In some cases, a destination may find it easier to develop a reputation as a mountain biking area by catering to the more extreme, hard adventure participant through special events, before moving into softer adventure activities. Less challenging trails would be required for catering to the family-oriented market.
- Operators will need to either specialize in a particular type of cycling activity and market segment, or carry a wide selection of equipment if they rent. As well, retail sales of equipment and clothing may present an additional opportunity for these operators.
- Using special, local events such as festivals from which to draw participants can help market development.

Keys to Success – Challenge, variety and convenience

- Developing trails in areas with natural and cultural features.
- For the soft adventure market, selecting routes which are more secluded, yet have interesting destinations, such as back roads.
- Ensuring trails/roads are kept in shape, in co-operation with other user groups.
- Allowing for time to learn and interact with the areas visited.
- Having guides with good knowledge of the area to share with guests.
- Developing a network with enough basic infrastructure for all levels of cyclists.
- Offering free clinics for technical riding and providing practise time for technical manoeuvres before going on a trip.
- Ensuring that trip is planned for meals and accommodation that is in line with the expectations of the participant.
- Moab Utah is the premier mountain biking destination in North America. Its popularity is attributed to accessibility (reachable by major highway), range of trails, good infrastructure (ample camping, chair lift to alpine), frequent events and multi-activity options such as rafting, hiking and climbing.

Complementary Activities:

- Can provide another recreational activity in tourism matrix that helps to keep visitors in the region
- Bicycle repair and sales outlet
- Cycling clinics and instructional programs
- Trail building and maintenance

Comments:

- This product could augment the existing services of a bicycle business that is currently established in Golden.

Mountaineering & Rock Climbing

Product Ideas:

- Mountaineering and rock climbing schools and courses
- Outdoor activity school
- Small retail outlet
- Climbing gym
- Hostel / accommodation / food services
- Guided trips
- Guide books
- Joint marketing and promotion of mountaineering and rock climbing businesses with other tourism businesses

It was felt that the above ideas need to combine in a single product in order for the business to be economically viable. Note: not all of the ideas need be in the proposed product

Mountaineering & Rock Climbing

Product Description:

Full service guiding business with a retail and school component

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Central location accessible to Rogers Pass, Rockies and the Bugaboos • Accessible teaching terrain • Access to alpine areas • Permissible and available road and air access to many remote areas	▪ Retail / office/ school location ▪ Access to a climbing gym ▪ Access to backcountry huts and cabins	▪ Professionals who have the money, skills but not the time to organize mountaineering / climbing trips ▪ School age children ▪ Women	▪ Licensed guides ▪ Permits and tenures ▪ Environmental issues

Overall Potential – Moderate

- Natural resources favour development, but potential is modest because of the current lack of developed mountaineering products. The demand for mountaineering is relatively low and derives from a highly specialized market. It is regarded as a high-risk activity and this will restrict its appeal to the "hard" outdoor adventure market. Rockclimbing may have more short-term potential as access will grow as technology improves and more soft adventurers enter the market. But there is also a growing "extreme" market for rock climbing.
- The association with the Canadian Rockies and the National and Provincial park system, and the fact that the area has long been associated with the "Canadian Alps" all enhance the marketability of the mountaineering and climbing product in the Columbia.

Competition – Moderate

- For climbing, the Columbia would have to be considered a secondary destination behind Alberta (Canmore, Kananaskis) and the Squamish and Skaha areas both of which draw from short-haul markets in the Pacific Northwest.
- The market for mountaineering is small, while many other areas right around the world have much more advanced infrastructure, products and marketing programs geared toward demanding mountaineers and climbers. The majority of the hut system in the Rockies run by the Alpine Club of Canada (ACC) and BC Parks also caters to mountaineers.

Business Practices – Low revenues, low returns

- The average Canadian climbing operator had annual gross revenues of $93,578 in 1993, with 69% bringing in less than $50,000 annually. The gross margins are low, averaging 12.9% due to high labour expenses. The average number of visitors per operation was 213, trip length was 4.7 days, and per day revenues approximately $113.

Business Development – Increase appeal by reducing risk

- Multi-day products could be enhanced with huts or a hut-to-hut system as an alternative to camping.
- Mountaineering has been made more accessible through the use of helicopters, snowmobiles and glacier ski planes. Operators can appeal to the softer adventure market by using motorized transportation and superior accommodation facilities to offset trip durations and safety concerns. In catering to the soft adventure participant and emphasizing the comforts of lodges and gourmet meals, clients are given the opportunity to "experience" the mountains and the thrill of summiting, without having to learn the hard, technical skills of mountaineering and climbing.
- Indoor climbing and bouldering have been growing in popularity in recent years. Operators in these activity areas will need to deal with overconfidence or lack of technical skill for those climbers moving from indoor to outdoor climbing.
- There is a high demand for safety in mountaineering/climbing which is inherently risky. At the same time, the activity is becoming more mainstream, with customers looking for instant gratification by achieving a tangible goal such as summiting a peak. Operators must screen for customer. Providing adequate instruction to minimize and deal with the risks involved, and establishing reasonable expectations for their customers are also important.

Keys to Success – Qualified, skilled guides, matching products to markets

- Planning routes that take advantage of local features and views without compromising safety.
- Scheduling trips during time of day and year where conditions are most agreeable.
- Easy access to and from base of climb.
- Hiring experienced, personable guides/instructors with certification in mountaineering, first aid, medical and leadership training.
- Training guides/instructors to keep up-to-date in safety procedures, first aid and soft skills.
- Selecting routes appropriate for customers that provide challenge without undue risk.
- Establishing publicized rules and procedures for behaviour and decision-making during the trip.
- Successfully matching markets with products (e.g. for soft adventure, comfortable lodging, for hard adventure, good campsites).

Complementary Activities:

- Guide books
- Accommodation and food services
- Shuttle services to remote backcountry areas

Comments:

- A number of professional mountain guides have guiding businesses in the Golden area. Enhanced cooperative marketing initiatives with other tourism businesses and resources would enhance this product access to the market.

Canoeing & Kayaking

Product Ideas:

- Kayak park / race course
- Canoe and kayak school, courses and rentals
- Shuttle service for paddlers with own boats / rental boats
- Bird watching by canoe / kayak
- Heli kayaking
- River camping opportunities

Canoeing & Kayaking

Product Description:

Canoe and kayak school, courses and rentals

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Rivers with a variety of grades from flat to class IV • Road access and egress points to rivers and lakes • Suggested sites include Kicking Horse River, Columbia River, Spillimacheen River, Bush Arm and Blaeberry	▪ Canoes and kayaks ▪ Accommodation ▪ Retail outlet ▪ Vehicle and trailer	▪ Adventure recreationists ▪ Families ▪ School groups ▪ Nature oriented clients ▪ Paddlers with differing skill levels	▪ Applicable licenses and permits ▪ Access points are limited along lakes and rivers

Overall Potential - Good

- Long-term trends show rising participation rates among North American markets, particularly among soft adventure participants rather than the extreme enthusiast market.
- All of these markets are seeking a broader outdoor adventure experience and may decide to participate in recreational paddling once in the region. The Columbia can offer a full range of close-in/remote adventures and is very well positioned to attract more visitors.
- The Columbia also has some outstanding rivers that offer higher grades of difficulty that appeal to enthusiasts and extreme sports, although most of the current commercial guiding is for rafting (e.g. Illecillewaet, Kicking Horse).

Competition – High

- There is extensive competition regionally and across Canada for canoeing and kayaking. Alberta Rockies, Kootenays, Thompson Okanagan and the Caribou offer quality river/lake experiences, with similar features to the Columbia.

Human Resources – Trained guides

- Instruction services are essential for a guiding outfit so having instructors with the ability to clearly explain, demonstrate and provide feedback and coaching is a benefit. This usually means instructors/guides who have proven certification and demonstrate ability to teach.

Business Practices – Good revenue potential and profits

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of $401,000 generated gross revenues of only $103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as $50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

Business Development – Variety of trip types and skill levels

- Nature observation, wildlife viewing and fishing are also attractants for these markets. The German market, especially, is interested in wildlife viewing. Whether canoeing or kayaking, product development has to incorporate some outstanding recreational feature, aesthetic appeal or valued secondary activity. Multi-activity packaging and interpretation is essential.
- People are generally looking for shorter trips, on average for 7 days when travelling abroad. Yield management for tour operators will be increasingly important as a result of running more numerous, short-term trips.
- Tour operators will need to tailor their trips to a diversity of user groups, and may be able to charge more for such customization. This may also provide greater opportunity to generate repeat business with satisfied customers.

Keys to Success – Good equipment, water variety, convenient access

- Having modern, well-maintained equipment is important. This will require ongoing upgrading to newer equipment, which is especially important for river kayaking.
- A variety of water classes will give an operator some flexibility when catering to markets. Good whitewater is essential for enthusiasts, while lower classes are needed when serving lower-skilled, soft adventurers.
- If waterflow is controlled by dams, a coordinated plan to match water conditions with planned usage is important. This means investing time and effort in developing the itineraries and routes for trips. There should be pre-prepared options in the event of poor weather.
- Put-in and take-out sites should be easily accessible while coordinated support should be in place for take-outs.
- Interpreters and guides with a thorough knowledge of the area and ability to convey this in an interesting and informative way will appeal strongly to the soft adventure market which is interested in more than the canoeing or kayaking activity itself. This also applies to food and accommodation planning, making sure that clients have been matched with the anticipated service expectations.

Complementary Activities:

- Nature and interpretive tours along the Columbia valley wetlands
- River camping opportunities along the Columbia
- Accommodation sites along rivers and lakes

Comments:

- The Kicking Horse River is felt to be at capacity in terms of rafting companies conduct tours down the river. The river may have opportunities for advanced kayak schools.
- This product would probably have to be combined with another business product in order to be financially viable.

Fishing

Product Ideas:

- Guided tours
- Fishing equipment and supplies rental, sales and retail
- Fishing schools and instruction programs
- Fishing lodge
- Heli fishing
- Wildlife and scenic viewing
- Ice fishing
- Fly fishing

These product ideas have been combined into a single business opportunity of Guiding Services / Retail / Rentals / Instruction

Fishing

Product Description:

Guiding Services / Retail / Rentals / Instruction

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Variety of locations in the regions lakes, rivers and streams • Access by road • Heli access to alpine lakes • Based out of retail outlet in Golden	▪ Retail location ▪ Accommodation and food services ▪ Licensed guides ▪	▪ North American casual anglers ▪ Youth and families	▪ Adequate fish stocks ▪ Conflicts with other users ▪ Applicable permits /licenses, tenures

Overall Potential - Moderate

- Overall potential is moderate because of lack of recognition, lack of high quality fish resource and dams. Demand is not believed to be increasing significantly, but it is shifting. Non-resident visitors and younger, casual anglers are growth markets.
- The best targets are North American casual anglers who value easy access to the fishing venue, lodge accommodation and settings, and other activities offered during the stay. This segment is more likely to consist of families and couples. The sport fisherman market is already targeted by existing operators in the freshwater fishery.
- Ecotourism continues to grow in popularity. Fishing lodges will need to support activities other than fishing that are non-consumptive.

Competition – High

- There are several internationally renowned freshwater and saltwater fishing areas in the province with well developed infrastructure, guiding and lodging services.

Human Resources – Experienced fishing guides

- The typical BC fishing lodge employs around five seasonal personnel, but many smaller operations consist of an individual owner/operator. Guides with a good knowledge of fish, the peak fishing times, all fishing regulations, natural/cultural features and safety and natural hazards in the area are required.

Business Practices – Moderate capital costs, average returns

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of $401,000 generated gross revenues of only $103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as $50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

Business Development – Partnering and packaging

- By coordinating multi-activity packages, perhaps with regional golf courses and family-oriented outdoor activities such as hiking, nature observation and boating, then a full season product can be developed.
- Since this is essentially a North American product, the marketing program will consist of niche marketing targeted at consumer shows and display advertising.
- Partnering with accommodation establishments in the area, especially those with no existing tour offerings is one way to quickly enter the market.

Keys to Success – Multi-activity packages catering to families, quality gear and amenities

- Diversification away from pure fishing into other activities will not only broaden appeal to more traveller markets, it will reduce reliance on traditional fishing seasons and allow more options for building an all-season business. In the study area, the keys to developing high value fishing holidays (i.e. pristine, accessible fishing areas, good weather, good quantities and size of fish, easy catching, tenured access to freshwater fishery) cannot be easily assembled. Moreover, fish guiding is an inherently risky commercial outdoor activity. The province estimates the tidal and in-river sport fishery suffered an average 35% to 40% loss in business activity in 1998 as compared to 1997.
- Emphasizing the overall experience, not just catching fish.
- High-quality equipment and boats, as well as the appropriate bait and tackle for the species being fished is essential.
- For catering to the family market, and especially young anglers, some form of instruction (e.g. lessons from beginner to advanced) would help market development.
- Availability of packing and freezing services for out-of-town and overseas customers.
- Above-average food and accommodation.
- Ease of access to and from major centres.

Complementary Activities:

- Shuttle service
- Wildlife viewing, nature observation, hiking, boating
- Fly tying courses
- Fish stocking

Comments:

- A fishing equipment retail outlet currently exists in Golden and this would be a good product to expand into.

Hiking / Natural & Cultural Features Viewing

Product Ideas:

- Guided interpretive and nature tour hikes
- Multi day alpine tours
- Wilderness skills / outdoor school

(The above three ideas were combined into one product)

- Retail outlet
- Shuttle service

(The above two ideas were combined into one product)

- Elder hostels
- Retreats (based on themes of music, art, painting, health, meditation, etc)
- Lodge

(The above three ideas were combined into one product)

- Heli hiking

Hiking / natural & cultural features viewing

Product Description:

- Guided Interpretive hikes and nature tours

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
Wilderness areas, parks Trails Scenic natural values Wildlife Natural habitats Solitude	Trails Roads for access Shuttle service Maps / information Certified hiking guides	North American and German markets Seniors for elder hostels Nature lovers of all ages North American, Europeans, Japanese, other international Increasing market	Applicable licenses and permits Wildlife issues – clients want to see bears Conflicts on trails with other users

Overall Potential – Excellent

- The potential for development in the Columbia is excellent because of high quality resources, excellent trail systems and visitor markets that place a high value on hiking activity.
- Demand will continue to increase for hiking both as a primary activity and as a secondary activity in conjunction with other products. Because of its accessibility, low skill requirements, relative safety and instant appeal, growth rates among North American and European hiking markets are expected to continue to climb even as the overall population ages.
- The potential for commercial hiking tours spans a full range of options from multi-day trekking tours to short interpreted tours of the frontcountry.

Competition – High

- There is extensive competition regionally, nationally and internationally for travellers interested in pursuing hiking. The hiking enthusiast in pursuit of a challenging, wilderness trek products has a wide range of products and experiences to choose from. The neighbouring national parks also cater extensively to this market. Many communities and all parks have developed trail inventories and related services that create a safe and interesting product for the soft adventurer/participant.

Human Resources – Interpretation and safety

- The average Canadian hiking tour operator employed five seasonal personnel in 1993, with the majority of operators have less than four staff. Trained interpreters/guides who are experts in the area and interact well with people are important. First aid training is also a factor for day-hikes as well as for overnight trips.

Business Practices – Low capital costs, average profitability

- The average Canadian tour operator offering hiking as the major activity had annual gross revenues of $167,000 in 1993. Almost two thirds of operators brought in less than $50,000 and this contributed to a low average gross margin of 6.9%, considerably less than other activities. With an average number of travellers of 1,390, this equated to about $120 in revenue per traveller.
- Hiking and backpacking does not require a significant investment in equipment but trail and accommodation infrastructure is very important. Since the provision of these components can rarely be justified based on revenues available from hiking, multi-activity tourism has to be accommodated.

Business Development – Emphasize unique combinations of wilderness features and parks

- Target park visitors, including tour travellers in promotional activities.
- Niche marketing (e.g. slide shows, local presentations, communication with community groups) should be used to increase regional awareness of newly developed hiking products.
- The operation should be flexible enough to offer day hikes as well as overnight trips. The latter will have to be pressed through tour wholesalers or retail tour operators. Day hikes can be directly marketed to regional visitors who have some flex time for a short excursion.
- Hiking tour routes have to be developed around highly scenic, natural and recreational, and/or heritage/cultural resources. The better the signage, parking, garbage disposal, washrooms, and interpretative facilities the better the trip experience will be for users. Quality map information and investment in facilities is also important.
- In order for a guiding operation to succeed, it must provide a value-added service that hikers cannot obtain through self-guided hikes. This means creating a high-end experience through linkages to cultural/heritage interpretation, wildlife viewing, meals and lodging.
- Develop specialized tours or specialize completely in a specific market segment such as women only, seniors or at-risk youth. Although hiking appeals to a wide range of people demographically, it is important to identify specific target markets and their distinct needs.

Keys to Success – Interesting features, variable terrain, quality service

- For soft adventure travellers, well-developed, relatively easy trails, in an uncrowded and pristine environment are preferred.
- Interesting features for nature and/or culture for day trips.
- Overnight trips need access to good camping or hut locations. Soft adventure travellers will prefer lodges/cabins while the enthusiast will prefer tenting.
- Offering activities which add an educational or recreational component such as nature interpretation and wildlife viewing and photography. This may include teaching participants how to minimize impact when hiking and camping in wilderness areas.
- Developing good routes for trips including contingency routes in case of poor weather conditions or other parties.
- Understanding, then exceeding, expectations of participants for meals. An operator should always enquire about dietary restrictions and preferences of participants before the trip and develop a meal plan accordingly.
- For soft adventure, inbound logistics are important – providing the right transportation from a primary site, to the staging area and beyond is critical. This will require detailed planning to ensure that the appropriate vehicles are available and supplies packed.

Complementary Activities:

- Accommodations
- Visitor Centre
- Locally focused booking / central registry agency

Comments:

- The Golden area is centrally located to some world-class hiking / nature viewing landscapes.

Hiking / natural & cultural features viewing

Product Description:

- Lodge / Retreat / B&Bs

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Access to different activities from accommodation location • Roads / fly in areas / hike in • Wilderness areas, parks, solitude, wildlife	▪ Trails ▪ Roads for access ▪ Shuttle service ▪ Maps / information ▪ Certified hiking guides	▪ Soft adventure markets ▪ Seniors for elder hostels ▪ Nature lovers of all ages ▪ North American, Europeans, Japanese, other international ▪ Destination market ▪ Increasing market	▪ Applicable licenses and permits ▪ Conflicts on trails with other users ▪ Need for combined marketing ▪ Ability to keep visitors for more than one night ▪ Capacity of trails, areas to accommodate activities ▪ Competition from Banff / Lake Louise town centers

Overall Potential – Excellent

- Lodge/resort accommodation supports the development of many other products assessed in this report which cater to the growing soft adventure market. In general, the hard adventure/enthusiast market will be satisfied with minimal infrastructure and the availability of camping facilities.
- Lodges and resorts lodges are generally preferred by the experienced ecotourist, with 66 percent stating them as their preferred choice of accommodation. In contract, the general touring traveller prefers to stay in hotels/motels (56 percent).

Competition – Moderate

- Backcountry accommodation is not well developed in BC and, except in the case of fishing lodges, not that well marketed. There are some high quality lodge/resorts in the Canadian Rockies, but also room for expansion.

Human Resources – Multi-disciplinary personnel

- Cabins/lodges require a significant investment in "human capital" for hospitality services (i.e. food and lodging), interpretation and guiding.

Business Practices – High capital costs, long-term investing

- There are few statistics available for backcountry accommodation operations in BC outside of the sport fishing sector. Unaffiliated front-country accommodation facilities such as hotels and motels are rarely profitable without food and licensed beverage services, so backcountry cabins/lodges that are removed from convenient road access will be even more difficult to support.
- A wide range of capital costs are possible, depending on the nature and size of the facility.

Business Development – Emphasize unique combinations of wilderness features and parks

- Lodges are becoming multi-activity and multi-season resort destinations for both guided and self-guided activities. By being multi-activity and multi-season, lodges are in a better position to manage their cashflow and staff. It will be important to find complementary activities to leverage staff and equipment across seasons.
- Partnering with guiding operations to offer tours where expertise does not exist in-house.
- Theming is on the rise. 36 percent of leisure travellers surveyed said they were looking for a lodge, resort or hotel with a distinctive theme. Although outdoor adventure could be considered a theme in and of itself, the increasing number of lodges will dilute this as a differentiating factor. Therefore, specialization will become more important for a lodge to succeed.

Keys to Success – Proximity to activities, uncrowded, sustainability practices

- A remote, uncrowded, scenic location that has controlled access is preferred for accommodation development. Adding amenities that add to the enjoyment of the overall experience would improve marketability but this will be limited by the availability of capital.
- Providing gear, guides and interpretive services linked to multi-activity experiences.
- Ease of access to and from staging areas.
- Where the facility is geared toward trail-based activities like hiking, biking and nature observation there must be reasonable trails and access.
- Accommodation facilities which conform to sustainability principles. A first priority is facilities with minimum environmental impact. Buildings that demonstrate the use of recycled materials are becoming more common. The use of low quantities of water and electricity is desirable. Where possible, internal electrical generation, from water, wind and sun should take place.

Complementary Activities:

- Any number of theme focused retreats (health, food, hobbies, business workshops)
- Tie in with other activities in the area
- Locally focused booking / central registry agency

Comments:

- There currently are a number of lodges / B&Bs providing some aspect of this product. Increased joint marketing is felt to be required to improve Golden's ability to increase market share from other "outdoor adventure / natural " communities (i.e. Banff).

General Issues

The following points were some general issues and points that were raised during the workshop.

- Golden should have a professional full-time Tourism Marketing / Coordinator
- There appears to be enough business opportunity for a full-time Special events/ Festivals / Competition Coordinator
- Some of the activities found in the Golden area are unique and cannot be found elsewhere
- Need to ensure that potential tourism product opportunities are not promoted or developed unless there is room for growth in the local market and the environment can withstand the impact.
- Important to keep a balance between tourism development and the natural, wilderness and cultural values of the area.
- It is anticipated that Golden's population will double in the next 10 – 15 years. Important to have designated motorized and non-motorized areas.
- Golden needs to develop a forum / support network for young entrepreneurs.

Revelstoke Product Ideas

Snowmobiling

Product Ideas:

- Hut to hut tours
- Hotspring to hotspring tours
- Family tours (1-2 hours) – flat trail riding
- Food/fuel/service depot
- Snowmobile camps
- Test track
- Snowmobile skiing area
- Tours for railway fans
- Full Service alpine lodge for snowmobilers
- Trail maintenance and grooming

Snowmobiling

Product Description:

Professional (private) trail-grooming business

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Proximity to trail network • Highway access • Pull-out to offload trailer	• Base for equipment and machines • Fuel storage • Trailer for hauling machines • Fee of service system • License to pull trailer	• Snowmobile Club • Local, regional, provincial and inter-provincial snowmobilers	• Snowmobile Club would have to relinquish their current grooming process • Private land and right-of-way issues • Need to acquire liability insurance • Environmental and wildlife guidelines • Obtaining tenure • Existing tenures/operators • LUP's & RMP's*

Overall Potential – Moderate

- The market for a professional grooming service is unproven. In order to enter the market, it will be necessary to provide a level of service that existing clubs and operators cannot provide on their own. This may occur if snowmobile use in Revelstoke increases to the point where volunteer resources cannot be relied upon to meet demand and where revenues obtained from user fees can support the financial cost. The demand among commercial operators would not be enough to justify setting up this business.

Competition – High

- A commercial service would directly compete with volunteer efforts by the snowmobile club and market entry would only be feasible if it could be offered as a cost savings. In the end, a commercial service would only be viable if the main competitor was turned into a client.

Business Development – Snowmobile club cooperation

- Long-term contracts for grooming services would need to be negotiated.
- The snowmobile club could itself operate this service as a way to subsidize their own grooming needs.
- The revenue potential is small enough that other services would have to be offered in both winter and summer. With the development of any nordic skiing facilities with set-track needs, trail grooming is required. Often, this is done with snowmobiles.

Complementary Activities:

- Trails are used in summer too. This could be expanded into a year-round trail maintenance contract.

Comments:

- Signage needs to be improved, both for better information and safety purposes.
- Community Futures has lending power to assist new businesses getting started.

* LUP's & RMP's = Land Use Plans & Resource Management Processes

Snowmobiling

Product Description:

Snowmobile Camps/School/Courses & Test Track facility including sales/rental outlet and guided tours.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
▪ Near Town or in-town location preferable ▪ Flat area suitable for terrain complex including test track ▪ Highway access ▪ Direct access to trails	▪ Suitable parking ▪ Lodge or other warm-up facility with refreshments ▪ Office space with communications ▪ Experienced staff and guides ▪ Access to accommodation and meals	▪ Regional markets ▪ Beginners who wish to improve skills to "alpine" level ▪ Dealers & manufacturers wishing to test new products ▪ Competitors ▪ Families	▪ Significant capital investment ▪ Acquisition of private or public land ▪ Snow conditions at low elevations are inconsistent ▪ Environmental and wildlife guidelines ▪ Obtaining tenure ▪ Existing tenures/operators ▪ LUP's & RMP's

Overall Potential – Good

- The large snowfall, the allure of high alpine "powder" snowmobiling areas and the remote and spectacular scenery are all significant advantages for the Columbia District, as is proximity to the large and growing Alberta market.
- Snowmobiling is growing extremely fast. The increased demand and use is coming from residents, regional visitors and short-haul visitors.

Competition – High

- Broad choice of destinations are available across the province.
- Province-wide trail network will improve access to quality terrain in affected communities, but it will also increase participation.
- The keys to creating a competitive product (e.g. good snow conditions, variable terrain, integrated and well-signed/maintained trail systems, and access to higher alpine terrain and scenic destinations) are present in the Columbia.

Human Resources – Certified guides.

- Certified guides can be a significant bonus when catering to soft adventure and beginner markets where training and safety issues will be a concern. Clear, basic instruction for beginners and an emphasis on safety requires trained, qualified guides.

Business Practices – High capital costs, good profitability

- Capital expenditures for equipment can be extensive, or alternatively, leasing from dealerships can be undertaken. Operators can expect to pay $5,000 to over $10,000 for sleds.
- The average Canadian snowmobile tour operator had annual gross revenues of $395,000, but many are based in Quebec where tour companies tend to be much larger than the national average. Average gross margins are in the range of 17%, are among the highest of all outdoor adventure activities.

Business Development – Minimize user conflicts

- Since snowmobiling is not allowed in the parks, there will be a growing demand among other winter visitors (especially downhill skiers) who will be interested in snowmobiling as a secondary activity.
- Access to commercial tenure may be problematic because of overlapping terrain with other commercial users.
- The development of designated snowmobile trails can avoid user conflicts. Otherwise, planning for temporal and spatial separation from other activities can improve the visitor experience. Developing trails in co-operation with off-season users such as hikers, mountain bikers and horseback riders is also possible.

Keys to Success – Good equipment and access to quality terrain

- Developing strong relationships with and purchasing quality equipment from well-known vendors.
- Ensuring trails are well-maintained by working with local snowmobile clubs and associations.
- Having access to high quality resources.
- Adding value and service to the snowmobiling experience will encourage more visitors.
- Improving infrastructure and hospitality services to encourage longer and more frequent trips.
- Working with government and tourism agencies as well as environmental groups to develop and promote the trail systems.
- Developing a code of conduct for safety and environmental concerns which is strictly adhered to.

Complementary Activities:

- Track could satisfy needs of moto-cross and BMX riders. Develop year-round including shoulder season events.
- Corporate retreats and destination holidays to try out new snowmobiles.
- Open water sledding competitions.

Comments:

- Host competitions and new product debuts on test track
- Combining many snowmobile services in one large venue has many spin-off opportunities and benefits.
- There is currently a track in Revelstoke and it could be improved (make use of existing facility).

Ski Touring

Product Ideas:

- Hut to hut tours
- Lodge –based tours
- Multi-day, multi-experience tours (Ski touring, snowmobiling, ski-mountaineering, snowshoeing, XC skiing)
- Ski touring Lodge (Mica Area)
- Snowmobile assisted ski touring
- Rental/Sales shop in town

Ski Touring (plus other winter activities)

Product Description:

Multi-day, multi experience tours (ski touring, snowmobiling, ski-mountaineering, snowshoeing, XC skiing) based from Revelstoke

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Access to terrain for a variety of experiences • Base activities from location in town • Solitude – quiet spaces	▪ Use existing infrastructure for office ▪ Office space with communications ▪ Experienced staff and guides ▪ Access to accommodation and meals ▪ Equipment to participate in various activities ▪ Transportation – vans ▪ Full service guides ▪ Central booking / reservations	▪ Try new markets such as the "far-east" ▪ People wishing to try a variety of activities ▪ National and international ▪ California & Pacific Northwest	▪ Tenure for use of public lands • "Down-days" • Environmental and wildlife guidelines • Existing tenures/operators ▪ LUP's & RMP's

Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain.
- Infrastructure is well developed in Alberta Rockies.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost.

Human Resources – Highly qualified guides

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.

Business Practices – Average revenue potential, low returns

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of $230,122 in 1993, with about 50% bringing in less than $50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately $100. This is believed to be a good representation of the BC sector as almost one half of all operators in the country are based in BC.
- Most operators offer a mix of day-trips and overnight trips with preset packages the norm.

Business Development – Appeal to participants, beginners and niche markets

- Telemark skiing will become increasingly popular as will the overall market for nordic skiing. This will create demand for good beginner instruction and also increase the importance of the accommodation and other facilities in attracting the broader market. Specific niche markets such as women-only clinics and tours have good potential for expansion.
- As user fees becomes more prevalent in backcountry areas, more operators may begin working with recreational skiers and clubs to maintain and enhance high quality areas.
- Providing courses packaged with rentals and guided tours will encourage beginners and casual participants to participate.

Keys to Success – Quality terrain and equipment, remote but safe experiences.

- Good access to high quality terrain, including permits/tenure for secluded backcountry areas.
- For the destination-based traveller, high quality accommodation and support facilities. If specialized target markets are being attracted, then developing menu and accommodations have to be designed accordingly.
- High-quality, well-maintained equipment, with a variety of sizes suitable for the family market.
- Ability to answer questions from both beginners and experts on equipment and trails in the area.

Complementary Activities:

- Natural and cultural features viewing
- Training programs for beginners & families

Comments:

- Work with existing operators
- Use cooperative approach to advertising
- Work with MoF to integrate resource extraction with recreation use (e.g. cut more ski runs).

Ski Touring

Product Description:

Hut to Hut / Lodge-based ski touring

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Good quality ski touring terrain • Highway access or proximity to heli-port • Solitude – quiet spaces • Appropriate distance between huts	▪ Huts / Lodge (permanent structures) ▪ Qualified guides ▪ Transportation – vans ▪ Central booking / reservations	▪ Growing market for ski touring ▪ Attract beginners and intermediates who want to progress ▪ BC /Alberta / Pacific Northwest	▪ Tenure for use of public lands ▪ Wildlife ▪ Environmental issues e.g. waste ▪ Security for vehicles • Availability of guides • Terrain constraints • Wildlife guidelines • Existing tenures/operators ▪ LUP's & RMP's

Overall Potential - Moderate

- Demand is low but growing for this product. As skiing technology improves and as lift-service options expand, ski touring will become even more accessible to a broader market.
- The Columbia Forest District is well known throughout the Pacific North West as having some of the best ski touring conditions and areas. Though the Golden area has several commercial backcountry ski lodges, there is still room for development in niche areas. The best potential for commercial development is in association with hut or lodge-based operations.
- Parks Canada has stated that there is potential for some immediate modest growth in the local, regional and international adventure recreation markets, principally among winter backcountry users. Mount Revelstoke and Glacier have focused promotional efforts on the parks' high quality winter backcountry recreation opportunities.

Competition – High

- There are several areas in BC and Alberta with quality ski touring terrain and destination status, and numerous lodges targeting the destination-oriented ski tourer.
- Commercial operators will be challenged to attract clientele, because the park system, local alpine clubs and societies provide access to over 40 public backcountry huts to ski tourers at little or no cost.

Human Resources – Highly qualified guides and hospitality personnel

- Hiring qualified and certified guides and instructors is increasingly important as backcountry visitation increases and the risk to personal safety climbs. The vast majority of commercial ski tour operators use professionally certified adventure travel guides and/or tour leaders.
- Cabins/lodges require a significant investment in "human capital" for hospitality services (i.e. food and lodging), in addition to the professional guide services required for the ski touring.

Business Practices – Average revenue potential, low returns

- The average Canadian tour operator offering ski touring as the major activity had annual gross revenues of $230,122 in 1993, with about 50% bringing in less than $50,000 annually. The gross margins are not that attractive, averaging 4.2% due to higher-than-average operational expenses. The average number of skiers per operation was 572, trip length was between 4 and 4½ days, and per day revenues approximately $100. The average ski tour operator does not generate enough revenue to justify lodge/resort investments.
- Huts or lodges will add to the capital cost of a ski touring operation and necessitate the development of all season products to justify the added investments and improve returns. For developments on Crown land, the form of tenure is an important consideration. Huts on Crown land outside of parks are usually erected by recreation clubs who have been licensed for such development by the Ministry of Lands. There is no exclusivity of access to or within the huts to facilitate public access. Commercial use is considered unethical unless the operator reimburses for that use or otherwise contributes to maintenance and upkeep. Lodge development will require a Crown grant or lease to assure exclusive use of the facility.
- There are few instances of hut development on Crown land by commercial operators because of problems associated with vandalism and unauthorized use by the public. As huts would be usually be constructed on an existing trail, access would be available to all trail users. Even if a private operator constructed new trails for a hut or hut system, BCAL is likely to authorize such development through a Licence of Occupation, which would still allow public use of the trails and access to the hut (although the hut itself could be locked). This lack of exclusivity is likely to deter future commercial hut development.

Business Development – Coordinated system and policies

- As noted in the previous product idea, the expanding market for ski touring is attracting more soft adventurers to the sport and leading to more niche development. Services and products targeted at beginners, families, women and casual participants will enhance market potential.
- These markets are also looking for relatively good accommodation and food services compared to the hard adventurer who is just as likely to camp than stay in a hut or lodge.
- If a hut system is established, facility managers and users must establish clear guidelines for acceptable use and activities and the extent to which they can be done in the area supported by the huts. They must follow practices which minimize the impact on the environment.
- Capital costs can be kept low by choosing to provide minimal amenities that only need replenishment once in a while, or arrange for regular transport of supplies into the hut, either by motorized or non-motorized means.

Keys to Success – Quality ski terrain, quality accommodation

- All the elements of high quality ski touring should be present, including access to high quality terrain, a secluded, wilderness experience and quality guiding.
- For the destination-based traveller, lodge facilities should be high quality. If specialized target markets are being attracted, then developing menu and accommodations have to be designed accordingly.
- For hut systems, clearly identifying the purpose and role of the hut is important so visitors understand what experience they are getting. The term hut has different meanings in North America and Europe and should always be qualified by the operator.
- For hut systems, an operator who is able to work out user-agreements with local recreationists, perhaps for shared-use in some situations, is more likely to gain their acceptance and cooperation, thereby reducing vandalism and conflicts.

Complementary Activities:

- Natural and cultural features viewing
- Remote "think-tanks" and other types of retreats.

Comments:

- Need to recognize aging populations require more mellow terrain
- Executive retreat market is tough to get due to their stringent requirements.

This is a duplication of existing services – is there additional capacity?

Cross-Country Skiing

Product Ideas:

- Rental / sales outlet
- Events – races e.g. Lantern ski, biathlon
- Combine XC / Snowshoeing
- Need additional "high elevation" skiing for more consistent conditions
- Courses / instruction e.g. racing school, family & group lessons
- Lodge – with trails from lodge
- Develop flatter terrain

Cross-Country Skiing

Product Description:

A variety of Cross-Country skiing events to attract skiers and promote spin-off benefits for the community e.g. Loppet, Lantern Ski

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Trails with a variety of terrain to meet the needs of beginners, intermediate and advanced skiers • Appropriate elevation for consistent snow conditions	▪ An organized, well designed and signed trail complex ▪ Grooming machines ▪ Fuel, storage equipment and repair facilities ▪ Warm-up shelter(s) ▪ Event organization skills	▪ Families and local skiers ▪ Racers and elite athletes ▪ Destination skiers who want to try a variety of activities	▪ Need to develop a trail complex more appropriate for racing ▪ Competition from other areas (e.g. Silver Star) • Tenure for use of public land • Environmental and wildlife guidelines • Existing tenures/operators ▪ LUP's & RMP's

Overall Potential – Moderate

- Long-term participation trends are only average, and the ability to stage events should be tied to a well-serviced nordic centre which will have the capacity to deal with periodic increases in activity.
- According to Cross Country BC, "super events" could have some potential in the province, especially if they can appeal to the softer, beginner markets. Current loppets are top-down events geared toward the skilled enthusiast.

Competition – Moderate

- There are many well-established cross-country ski areas in BC and Alberta that offer similar terrain features and snow conditions and in some cases have superior infrastructure and amenities. There are 22 major races/loppets in BC this year, primarily in the Interior and the Okanagan.

Business Development – Sanctioned, innovative events

- Affiliations with official race or event series (e.g. BC Cup Series) is essential. Cross Country BC sanctions races in the province among its affiliated local clubs. Golden and Revelstoke nordic ski clubs are associated with Cross Country BC. National and international sanctions are also possible.
- As with any Cross-country ski product, there must be a favourable nordic ski area or centre and the required hospitality services. A minimum of 30 km events are standard.
- Organizing the loppet is very important and in order to be sanctioned must be innovative and enhance the visitor experience to increase participation and visitation. An assessment of the most successful loppets in other parts of the world could be undertaken. Local members may have to be educated on the different "styles" and "formats" of cross country ski competitions and encouraged to put them into their event hosting plans before a loppet is considered.
- Cross Country BC's Western Edge loppet program may be a model for development. Golden hosted the Huckleberry loppet in February of this year.

Complementary Activities:

- Trails can be used for mountain biking and hiking in the summer / shoulder seasons
- Horseback riding possibilities on selected trails

Comments:

- This sport doesn't have the "glamour" of alpine skiing and has a relatively finite market.

Cross-Country Skiing

Product Description:

Sales & rental outlet in association with an instructional facility.

Location Needs	**Supply & Infrastructure Needs**	**Potential Markets**	**Issues**
• Proximity to a well maintained trail complex with a variety of terrain • Lodge or day facility at trail base	▪ Retail and office space ▪ Van(s) for transportation ▪ Staff / Instructors ▪ Manager with expertise ▪ Equipment	▪ Local and regional skiers ▪ Attract destination market ▪ School Groups ▪ Tour Groups	▪ Mt. MacPherson needs more beginner terrain – flatter trails ▪ Daily grooming required • High volunteer requirement • Environmental and wildlife guidelines • Obtaining tenure • Existing tenures/operators ▪ LUP's & RMP's ▪ Willingness to pay

Overall Potential – Moderate

- Long-term participation trends are only average.
- Many nordic clubs and cross country organizations are struggling to broaden the appeal of cross country and increase participation levels. Until this happens, demand for services and instruction is unlikely to increase significantly.

Business Development –

- The feasibility of offering rentals to the cross country market would have to be carefully assessed. Viability can be improved by providing rentals for multiple activities and not just skiing.
- A combination of downhill and cross-country rentals could be targeted at downhill skiers. Cross-selling promotions could generate more rentals. Visitors renting downhill ski equipment could be offered rental packages for Mt. McPherson trails.
- Affiliations with the Revelstoke Nordic Ski Club could be arranged, providing rental savings to members in return for contra-promotion.
- Rentals could be made in cooperation with accommodation facilities and other sales venues for day trips by self-guided visitors. In addition, a service could be developed in conjunction with maps and guide books visitors may need to undertake self-guided tours.

Complementary Activities:

- This could mix well with other activities such as mountain biking.
- Work in cooperation with accommodation and food suppliers.

Comments:

- Cross-country skiing market is increasing – relatively affordable family activity.
- Better terrain for XC skiing at Cranberry Lake area.
- Critical mass needed to attract people

Mountain Biking

Product Ideas:

- Downhill trails – technical terrain complex
- Events – races
- Camp / instruction
- Overnight and multi-day tours
- Heli-mountain biking
- Hotspring tours
- Full spectrum mountain bike company
- Tie-in to kayaking and other activities
- Guidebook with GPS info and good photos
- Rentals / Lodge

Mountain Biking

Product Description:

Full spectrum mountain bike company offering sales, rentals, tours and instruction. Includes sponsoring races and other “events”.

Location Needs	**Supply & Infrastructure Needs**	**Potential Markets**	**Issues**
• Proximity to technical trail complex • Access to a variety of terrain such as old logging roads • Base from visible location in town	▪ Retail / rental space ▪ Mountain bike equipment ▪ Staff / instructors ▪ Van(s) for tour support ▪ Accommodation and food services	▪ Local and regional riders ▪ Racers ▪ Destination riders	▪ Wildlife encounters ▪ Environmental impact in sensitive areas (e.g. alpine) ▪ Tenure for use of public lands ▪ Road conditions / traffic during tours ▪ Existing tenures/operators ▪ LUP’s & RMP’s

Overall Potential – Good

- The potential is good for the mountain biking product in the Columbia. BC is growing in popularity as a mountain biking destination and demand will continue to rise. The lack of destination status and facilities for either touring or mountain biking limits the potential across all markets, although there is ample resource potential for expansion.
- Multi-activity packages and tours will be necessary for attracting more touring visitors.

Competition – High

- Competition is high for the mountain biking participant, regionally and provincially. Squamish, Whistler and the North Shore Mountains of the Lower Mainland are considered by enthusiasts to be among the premier mountain biking destinations for extreme free-riding. Facilities are well developed in many places around the province. In Canada, there are no comparable areas to the US mecca of mountain biking, Moab, Utah.

- It is fairly easy to respond to any rising demand for biking because the business is not capital intensive and services can easily be an add-on feature for existing operators who might be offering other products (providing operators have access to trails). A large number of outdoor adventure operators offer cycling as a secondary activity.

Business Practices – Low revenues, but excellent returns

- The average Canadian bicycling tour operator had annual gross revenues of $151,541 in 1993, with 55% bringing in less than $50,000 annually. The gross margins are among the highest of all outdoor activities, averaging 31.9% due to significantly low operational expenses. The average number of visitors per operation was 250, trip length was 5.6 days, and per day revenues approximately $115. These averages include both cycle touring and off-road participants.

Business Development – Superior trail system, close in infrastructure

- Mountain biking and tour operators will need to collaborate with the local accommodation industry and other tourism providers to support their product. Packaging with other guided activities will extend the reach to soft adventurers. Developing commercial ventures in the study area will be a real challenge because it is often convenient to engage in unguided activities. With an extensive network of maps, guides and on-line resources, most visitors can gain a thorough understanding of biking options on the Internet. The key will be providing convenient support services (shuttling, rentals, repair, accommodation, meals, interpretation) to convert these participants to buyers of a value-added product.
- Trails can either be developed separately for each activity such as mountain biking or for shared use. The development of shared-use trails in co-operation with other user groups is more cost-effective in using a limited, common land resource.
- One option is to utilize ddownhill ski areas which can provide easy access to the alpine and allow for use of ski trails. A mix of purpose-built biking trails (gnarly trails with more obstacles) would be attractive to extreme enthusiasts. In some cases, a destination may find it easier to develop a reputation as a mountain biking area by catering to the more extreme, hard adventure participant through special events, before moving into softer adventure activities. Less challenging trails would be required for catering to the family-oriented market.
- Operators will need to either specialize in a particular type of cycling activity and market segment, or carry a wide selection of equipment if they rent. As well, retail sales of equipment and clothing may present an additional opportunity for these operators.
- Using special, local events such as festivals from which to draw participants can help market development.

Keys to Success – Challenge, variety and convenience

- Developing trails in areas with natural and cultural features.
- For the soft adventure market, selecting routes which are more secluded, yet have interesting destinations, such as back roads.
- Ensuring trails/roads are kept in shape, in co-operation with other user groups.
- Allowing for time to learn and interact with the areas visited.
- Having guides with good knowledge of the area to share with guests.
- Developing a network with enough basic infrastructure for all levels of cyclists.
- Offering free clinics for technical riding and providing practise time for technical manoeuvres before going on a trip.
- Ensuring that trip is planned for meals and accommodation that is in line with the expectations of the participant.
- Moab Utah is the premier mountain biking destination in North America. Its popularity is attributed to accessibility (reachable by major highway), range of trails, good infrastructure (ample camping, chair lift to alpine), frequent events and multi-activity options such as rafting, hiking and climbing.

Complementary Activities:

- Natural and cultural features viewing – take advantage of spectacular sights and local history to enhance the experience.
- Development of a mountain biking guidebook for sale.

Comments:

- Integrate with ski hill – use lifts or drive to the top.
- Need better signs for safety and convenience.

Mountaineering & Rockclimbing

Product Ideas:

- Mountain Guide Company and mountaineering school
    - offer different levels of programs
    - branch out to bigger mountains
    - history of mountaineering in Revelstoke
- Heli-mountaineering
    - Families
    - High-end destination market
- Commercial Climbing Wall

Mountaineering & Rockclimbing

Product Description:

Full service mountaineering guide company with a "school" for instruction and certification.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Access to a variety of beginner, intermediate and technical mountaineering terrain • Access and proximity to climbing routes	▪ Permanent base for office and training requirements ▪ Climbing gym for wet days and basic instruction ▪ Transportation support (e.g. vans, helicopter) ▪ Accommodation & food services ▪ Qualified guides and instructors	▪ North American market ▪ Links with colleges - Students entering guiding profession ▪ Destination rockclimbers and mountaineers	▪ Need park permit for national Parks ▪ Competition with the Rockies ▪ Environmental issues • Park capacity • Environmental and wildlife guidelines • Obtaining tenure • Existing tenures/operators ▪ LUP's & RMP's

Overall Potential – Moderate

- Natural resources favour development, but potential is modest because of the current lack of developed mountaineering products. The demand for mountaineering is relatively low and derives from a highly specialized market. It is regarded as a high-risk activity and this will restrict its appeal to the "hard" outdoor adventure market. Rockclimbing may have more short-term potential as access will grow as technology improves and more soft adventurers enter the market. But there is also a growing "extreme" market for rock climbing.
- The association with the Canadian Rockies and the National and Provincial park system, and the fact that the area has long been associated with the "Canadian Alps" all enhance the marketability of the mountaineering and climbing product in the Columbia.

Competition – Moderate

- For climbing, the Columbia would have to be considered a secondary destination behind Alberta (Canmore, Kananaskis) and the Squamish and Skaha areas both of which draw from short-haul markets in the Pacific Northwest.
- The market for mountaineering is small, while many other areas right around the world have much more advanced infrastructure, products and marketing programs geared toward demanding mountaineers and climbers. The majority of the hut system in the Rockies run by the Alpine Club of Canada (ACC) and BC Parks also caters to mountaineers.

Business Practices – Low revenues, low returns

- The average Canadian climbing operator had annual gross revenues of $93,578 in 1993, with 69% bringing in less than $50,000 annually. The gross margins are low, averaging 12.9% due to high labour expenses. The average number of visitors per operation was 213, trip length was 4.7 days, and per day revenues approximately $113.

Business Development – Increase appeal by reducing risk

- Multi-day products could be enhanced with huts or a hut-to-hut system as an alternative to camping.
- Mountaineering has been made more accessible through the use of helicopters, snowmobiles and glacier ski planes. Operators can appeal to the softer adventure market by using motorized transportation and superior accommodation facilities to offset trip durations and safety concerns. In catering to the soft adventure participant and emphasizing the comforts of lodges and gourmet meals, clients are given the opportunity to "experience" the mountains and the thrill of summiting, without having to learn the hard, technical skills of mountaineering and climbing.
- Indoor climbing and bouldering have been growing in popularity in recent years. Operators in these activity areas will need to deal with overconfidence or lack of technical skill for those climbers moving from indoor to outdoor climbing.
- There is a high demand for safety in mountaineering/climbing which is inherently risky. At the same time, the activity is becoming more mainstream, with customers looking for instant gratification by achieving a tangible goal such as summiting a peak. Operators must screen for customer. Providing adequate instruction to minimize and deal with the risks involved, and establishing reasonable expectations for their customers are also important.

Keys to Success – Qualified, skilled guides, matching products to markets

- Planning routes that take advantage of local features and views without compromising safety.
- Scheduling trips during time of day and year where conditions are most agreeable.
- Easy access to and from base of climb.
- Hiring experienced, personable guides/instructors with certification in mountaineering, first aid, medical and leadership training.
- Training guides/instructors to keep up-to-date in safety procedures, first aid and soft skills.
- Selecting routes appropriate for customers that provide challenge without undue risk.
- Establishing publicized rules and procedures for behaviour and decision-making during the trip.
- Successfully matching markets with products (e.g. for soft adventure, comfortable lodging, for hard adventure, good campsites).

Complementary Activities:

- Could be combined with ski-mountaineering / ski touring, for year-round business.
- Rockclimbing and bouldering competitions.

Comments:

- Similar to service that "Yamnuska" supplies in Canmore
- Co-marketing opportunities with hotel in Rogers Pass
- Market history of Rogers Pass and "classic" climbs like Mt. Sir Donald.
- Climbing gym is a useful adjunct to Mountain School, but requires large volume of "drop-in" business to be successful as a stand-alone business.

Canoeing & Kayaking

Product Ideas:

- Rental / sales outlet
- Events – EcoAdventure Race series (combined with other activities)
- Instruction School
- Tours – Arrow Lakes
- Multi-day sea kayak tours
- Guidebook
- Combine with other activities
  - Combine with resort
  - Combine with other "more sexy" destinations and experiences
  - Partner with food & accommodation suppliers

Canoeing & Kayaking

Product Description:

Canoeing / kayaking tour company including instruction and skill development courses.

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Access to single and multi-day canoe/kayak routes • Flat water routes and fast water routes	▪ Canoe/kayak gear and equipment ▪ Van(s) for transportation ▪ Trailer ▪ Accommodation and food service support ▪ Trained guides & instructors	▪ Regional and destination markets ▪ School groups	▪ Licenses & permits ▪ Fluctuating water levels on reservoirs ▪ Weather conditions • Good road access & egress points • Environmental and wildlife guidelines • Obtaining tenure • Existing tenures/operators ▪ LUP's & RMP's

Overall Potential - Good

- Long-term trends show rising participation rates among North American markets, particularly among soft adventure participants rather than the extreme enthusiast market.
- All of these markets are seeking a broader outdoor adventure experience and may decide to participate in recreational paddling once in the region. The Columbia can offer a full range of close-in/remote adventures and is very well positioned to attract more visitors.
- The Columbia also has some outstanding rivers that offer higher grades of difficulty that appeal to enthusiasts and extreme sports, although most of the current commercial guiding is for rafting (e.g. Illecillewaet, Kicking Horse).

Competition – High

- There is extensive competition regionally and across Canada for canoeing and kayaking. Alberta Rockies, Kootenays, Thompson Okanagan and the Caribou offer quality river/lake experiences, with similar features to the Columbia.

Human Resources – Trained guides

- Instruction services are essential for a guiding outfit so having instructors with the ability to clearly explain, demonstrate and provide feedback and coaching is a benefit. This usually means instructors/guides who have proven certification and demonstrate ability to teach.

Business Practices – Good revenue potential and profits

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of $401,000 generated gross revenues of only $103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as $50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

Business Development – Variety of trip types and skill levels

- Nature observation, wildlife viewing and fishing are also attractants for these markets. The German market, especially, is interested in wildlife viewing. Whether canoeing or kayaking, product development has to incorporate some outstanding recreational feature, aesthetic appeal or valued secondary activity. Multi-activity packaging and interpretation is essential.
- People are generally looking for shorter trips, on average for 7 days when travelling abroad. Yield management for tour operators will be increasingly important as a result of running more numerous, short-term trips.
- Tour operators will need to tailor their trips to a diversity of user groups, and may be able to charge more for such customization. This may also provide greater opportunity to generate repeat business with satisfied customers.

Keys to Success – Good equipment, water variety, convenient access

- Having modern, well-maintained equipment is important. This will require ongoing upgrading to newer equipment, which is especially important for river kayaking.
- A variety of water classes will give an operator some flexibility when catering to markets. Good whitewater is essential for enthusiasts, while lower classes are needed when serving lower-skilled, soft adventurers.
- If waterflow is controlled by dams, a coordinated plan to match water conditions with planned usage is important. This means investing time and effort in developing the itineraries and routes for trips. There should be pre-prepared options in the event of poor weather.
- Put-in and take-out sites should be easily accessible while coordinated support should be in place for take-outs.
- Interpreters and guides with a thorough knowledge of the area and ability to convey this in an interesting and informative way will appeal strongly to the soft adventure market which is interested in more than the canoeing or kayaking activity itself. This also applies to food and accommodation planning, making sure that clients have been matched with the anticipated service expectations.

Complementary Activities:

- Natural and cultural features viewing. Lots of heritage themes around Revelstoke like old mines and trails.

Comments:

- Resort could be the base for this activity or a destination / turn-around point.
- Probably need to combine this with other activities to be viable.

Fishing

Product Ideas:

- Guided fishing tours
- Heli-fly fishing
- Fishing Resort & Marina
- Courses / Instruction
- Tackle Shop

Fishing

Product Description:

Fishing resort and marina

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
Lakeshore with scenic views and good fishing Lake Revelstoke, Arrow Lakes, Kinbasket Lake Proximity to "four-season" terrain	Resort Lodge and outbuildings Docks, moorage, boat launch Helicopter access Transportation	Albertans Americans Europeans Husbands & Wives	Environmental and wildlife guidelines Significant capital investment Poor condition of public areas e.g. campsites / toilets / garbage Obtaining tenure Existing tenures/operators Lack of boat launches & other supporting infrastructure LUP's & RMP's

Overall Potential - Moderate

- Overall potential is moderate because of lack of recognition, lack of high quality fish resource and dams. Demand is not believed to be increasing significantly, but it is shifting. Non-resident visitors and younger, casual anglers are growth markets.
- The best targets are North American casual anglers who value easy access to the fishing venue, lodge accommodation and settings, and other activities offered during the stay. This segment is more likely to consist of families and couples. The sport fisherman market is already targeted by existing operators in the freshwater fishery.
- Ecotourism continues to grow in popularity. Fishing lodges will need to support activities other than fishing that are non-consumptive.

Competition – High

- There are several internationally renowned freshwater and saltwater fishing areas in the province with well developed infrastructure, guiding and lodging services.

Human Resources – Experienced fishing guides

- The typical BC fishing lodge employs around five seasonal personnel, but many smaller operations consist of an individual owner/operator. Guides with a good knowledge of fish, the peak fishing times, all fishing regulations, natural/cultural features and safety and natural hazards in the area are required.

Business Practices – Moderate capital costs, average returns

- The return on capital for the fishing lodge sector in BC is not very good. A 1988 report revealed that an average investment of $401,000 generated gross revenues of only $103,000 per operator. This would include land and building costs. An operation with no hard infrastructure and offering only day guiding services could be established for as little as $50,000, primarily for boat and fishing equipment.
- A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and other activities offered were significantly more common at freshwater lodges.

Business Development – Partnering and packaging

- By coordinating multi-activity packages, perhaps with regional golf courses and family-oriented outdoor activities such as hiking, nature observation and boating, then a full season product can be developed.
- Since this is essentially a North American product, the marketing program will consist of niche marketing targeted at consumer shows and display advertising.
- Partnering with accommodation establishments in the area, especially those with no existing tour offerings is one way to quickly enter the market.

Keys to Success – Multi-activity packages catering to families, quality gear and amenities

- Diversification away from pure fishing into other activities will not only broaden appeal to more traveller markets, it will reduce reliance on traditional fishing seasons and allow more options for building an all-season business. In the study area, the keys to developing high value fishing holidays (i.e. pristine, accessible fishing areas, good weather, good quantities and size of fish, easy catching, tenured access to freshwater fishery) cannot be easily assembled. Moreover, fish guiding is an inherently risky commercial outdoor activity. The province estimates the tidal and in-river sport fishery suffered an average 35% to 40% loss in business activity in 1998 as compared to 1997.
- Emphasizing the overall experience, not just catching fish.
- High-quality equipment and boats, as well as the appropriate bait and tackle for the species being fished is essential.
- For catering to the family market, and especially young anglers, some form of instruction (e.g. lessons from beginner to advanced) would help market development.
- Availability of packing and freezing services for out-of-town and overseas customers.
- Above-average food and accommodation.
- Ease of access to and from major centres.

Complementary Activities:

Hiking, Natural and Cultural features viewing, health spa, tackle shop / outdoor equipment retail outlet, skiing, snowmobiling etc.

Comments:

- This product would likely have to be a "four-season" resort catering to people who like to undertake a variety of outdoor activities, but also have all the comforts of home for those who want to be pampered.

Hiking / Natural & Cultural Features Viewing

Product Ideas:

- Tie in with nature walks
- Guidebook – link with park guidebooks
- Trail construction business
- Guided hikes from hotels
- B&B specializing in hiking
- Combine with interpretation
- "Travel Agency" for local opportunities

Hiking / natural & cultural features viewing

Product Description:

Guided hiking tours combining interpretation of nature and historical features of interest

Location Needs	Supply & Infrastructure Needs	Potential Markets	Issues
• Access to scenic trails with panoramas and features of interest	▪ Central office and booking services based from town ▪ Equipment (e.g. packs and safety provisions) ▪ Food and accommodation services ▪ Transportation ▪ Guides ▪ Need to build trails if none exist	▪ North American and German markets. ▪ Some drop-in traffic (Highway#1) ▪ Hiking Clubs ▪ Destination hikers / trekkers ▪ Hotel / B&B guests ▪ Tour groups / packages ▪ Schools / Elderhostels	▪ Tenure / permits ▪ Wildlife / environmental issues ▪ Safety ▪ Limited season for alpine hiking • Condition of trails (poor maintenance) • Existing tenures/operators ▪ LUP's & RMP's

Overall Potential – Excellent

- The potential for development in the Columbia is excellent because of high quality resources, excellent trail systems and visitor markets that place a high value on hiking activity.
- Demand will continue to increase for hiking both as a primary activity and as a secondary activity in conjunction with other products. Because of its accessibility, low skill requirements, relative safety and instant appeal, growth rates among North American and European hiking markets are expected to continue to climb even as the overall population ages.
- The potential for commercial hiking tours spans a full range of options from multi-day trekking tours to short interpreted tours of the frontcountry.

Competition – High

- There is extensive competition regionally, nationally and internationally for travellers interested in pursuing hiking. The hiking enthusiast in pursuit of a challenging, wilderness trek products has a wide range of products and experiences to choose from. The neighbouring national parks also cater extensively to this market. Many communities and all parks have developed trail inventories and related services that create a safe and interesting product for the soft adventurer/participant.

Human Resources – Interpretation and safety

- The average Canadian hiking tour operator employed five seasonal personnel in 1993, with the majority of operators have less than four staff. Trained interpreters/guides who are experts in the area and interact well with people are important. First aid training is also a factor for day-hikes as well as for overnight trips.

Business Practices – Low capital costs, average profitability

- The average Canadian tour operator offering hiking as the major activity had annual gross revenues of $167,000 in 1993. Almost two thirds of operators brought in less than $50,000 and this contributed to a low average gross margin of 6.9%, considerably less than other activities. With an average number of travellers of 1,390, this equated to about $120 in revenue per traveller.
- Hiking and backpacking does not require a significant investment in equipment but trail and accommodation infrastructure is very important. Since the provision of these components can rarely be justified based on revenues available from hiking, multi-activity tourism has to be accommodated.

Business Development – Emphasize unique combinations of wilderness features and parks

- Target park visitors, including tour travellers in promotional activities.
- Niche marketing (e.g. slide shows, local presentations, communication with community groups) should be used to increase regional awareness of newly developed hiking products.
- The operation should be flexible enough to offer day hikes as well as overnight trips. The latter will have to be presold through tour wholesalers or retail tour operators. Day hikes can be directly marketed to regional visitors who have some flex time for a short excursion.
- Hiking tour routes have to be developed around highly scenic, natural and recreational, and/or heritage/cultural resources. The better the signage, parking, garbage disposal, washrooms, and interpretative facilities the better the trip experience will be for users. Quality map information and investment in facilities is also important.
- In order for a guiding operation to succeed, it must provide a value-added service that hikers cannot obtain through self-guided hikes. This means creating a high-end experience through linkages to cultural/heritage interpretation, wildlife viewing, meals and lodging.
- Develop specialized tours or specialize completely in a specific market segment such as women only, seniors or at-risk youth. Although hiking appeals to a wide range of people demographically, it is important to identify specific target markets and their distinct needs.

Keys to Success – Trails, interesting features, variable terrain

- For soft adventure travellers, well-developed, relatively easy trails, in an uncrowded and pristine environment are preferred.
- Interesting features for nature and/or culture for day trips.
- Overnight trips need access to good camping or hut locations. Soft adventure travellers will prefer lodges/cabins while the enthusiast will prefer tenting.
- Offering activities which add an educational or recreational component such as nature interpretation and wildlife viewing and photography. This may include teaching participants how to minimize impact when hiking and camping in wilderness areas.
- Developing good routes for trips including contingency routes in case of poor weather conditions or other parties.
- Understanding, then exceeding, expectations of participants for meals. An operator should always enquire about dietary restrictions and preferences of participants before the trip and develop a meal plan accordingly.
- For soft adventure, inbound logistics are important – providing the right transportation from a primary site, to the staging area and beyond is critical. This will require detailed planning to ensure that the appropriate vehicles are available and supplies packed.

Complementary Activities:

- Mountaineering School.
- Nature and educational tours.

Comments:

- This could be developed into a multi-activity travel business for local opportunities (selling Revelstoke from Revelstoke).

APPENDIX 4 – Ministry Contacts & Responsibilities

Ministry of Environment, Lands and Parks:
Responsible for the protection and management of provincial parks, recreation areas, wildlife management areas and ecological reserves. Also responsible for managing wildlife on Crown Lands. B.C. Parks is a division of the Ministry of Environment, Lands and Parks, which manages B.C.'s provincial parks.

Wayne Stetski
District Manager, BC Parks
Kootenay District
Box 118
Wasa, B.C. V0B 2K0
(250) 422-4200
Dennis McDonald
Regional Director, Nelson Region
Ministry of Environment, Lands & Parks
#401 333 Victoria Street,
Nelson, B.C. V1L 4K3
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Bob Brade
Forest Ecosystem Specialist
Ministry of Environment, Lands & Parks
Box 9158
Revelstoke, B.C. V0E 3K0
(250) 837-7611
Gord McAdams
Ministry of Environment, Lands & Parks
#401 333 Victoria Street,
Nelson, B.C. V1L 4K3
(250) 354-6911

Ministry of Small Business, Tourism and Culture:
Develops tourism land-use policy, conducts tourism recreation opportunity studies, and manages a province-wide inventory of existing tourism activities and capabilities on Crown land.

Government Agent Courthouse, Room 104 P.O. Box 380 1123 2nd Street West Revelstoke, B.C. V0E 2S0 (250) 837-7636	Government Agent 930 9th Street South Golden, B.C. V0A 1H0 (250) 344-7550
Ministry of Small Business, Tourism & Culture Tourism Policy and Land Use P.O. Box 9805, Stn. Prov. Gov't. 5th Floor 1405 Douglas Street, Victoria, B.C. V8W 9W1 (250) 387-9376	Kevin Weaver Regional Manager Ministry of Small Business, Tourism & Culture 100 Cranbrook Street, Cranbrook, B.C. V1C 3P9 (250) 489-3906

Ministry of Forests:

Responsible for managing recreation on provincial Crown lands outside parks and settled areas, except where tenures are required.

Jon Wilsgard Recreation Officer, Columbia Forest District Ministry of Forests – Golden Office 800 9th Street North Golden, B.C. V0A 1H0 (250) 344-7500	Columbia Forest District 1761 Big Eddy Road Revelstoke, B.C. V0E 3K0 (250) 837-7611

Tourism B.C.:

Previously a division of the Ministry of Small Business, Tourism and Culture; became a Crown corporation in 1997. Works with B.C.'s tourism industry to promote the tourist trade and develop programs related to marketing, industry training and visitor services.

Tourism BC Box 9830 Stn Prov Gov't 3rd Floor, 1117 Wharf Street Victoria, B.C. V8W 9W5 (250) 356- 6363	

B.C. Assets and Land Corporation:

A Crown corporation that provides lands and assets marketing and land management services for the government of B.C. As of 1998, the corporation has the responsibility of managing tenures on provincial Crown land.

Robin Fawcett BCALC 828-A Baker Street, Cranbrook, B.C. V1C 1A2 (250) 426-1414	

Land Use Co-ordination Office:

Purpose is to oversee, co-ordinate, evaluate and report to Cabinet on Ministries' work to deliver the provincial land-use strategy. Facilitates land-use decisions by ensuring that all values, interests and impacts are identified, including recreation. Co-ordinates the development of sub-regional land-use planning initiatives and the work of "Inter-agency Management Committees".

Land Use Coordination Office PO Box 9426 Stn Prov Gov't 2nd Floor, 836 Yates Street, Victoria, B.C. V8W 9V1 (250) 387-1526	

Parks Canada:
An agency of the federal Department of Canadian Heritage. Manages National Parks and National Historic Sites.

Dave Cairns Yoho National Park P.O. Box 99 Field, B.C. V0A 1G0 (250) 343-6330	Rick Reynolds Mt. Revelstoke & Glacier National Parks 350 3rd Street West Revelstoke, B.C. V0E 2S0 (250) 837-7500

APPENDIX 5 – Parks Canada Business Parameters

Columbia District Tourism Opportunity Strategy - Yoho National Park

Tourism operators in Yoho National Park are expected to respect the integrity of the natural environment and provide visitors with an immersion in the natural and cultural heritage of the park. Operators need to support the 'Heritage Tourism' approach which means that they will raise awareness about the park; promote sustainable tourism by encouraging environmental stewardship; deliver products and services that are appropriate and consistent with heritage and environmental protection; and finally, they will train employees' so they can share an understanding of the Park's natural and cultural heritage with visitors.

Parks Canada is supportive of appropriate businesses in Yoho National Park. However, a moratorium on issuing business licenses to new "outdoor activities" business is in place at the time of writing. In addition, the business opportunities in this study are subject to limits and conditions.

Readers who wish to provide services in Yoho National Park are urged to first contact the **Municipal and Realty Officer at 250-343-6324** regarding the latest on business license requirements. The 'Business License Application for an Outdoor Activities Business License' provides specific information on the process and limitations that apply. The Park Management Plan for Yoho National Park is a second essential source of information. It will help you develop a business that is relevant and appropriate to Yoho National Park. The plan is available on the website at: http://www.parkscanada.gc.ca/yoho. In addition, the management plan on CD ($5.00), or paper copies ($20.00), can be purchased by calling Kootenay National Park at: 1-250-347-9615. Park brochures are another source, which provides basic information about the park.

Nine of the ten activities in this 'Tourism Opportunity Study' are allowed in Yoho National Park. The park applies 'Appropriate Use Criterion' to determine the type and amount of an activity allowed. In order to achieve ecological and visitor experience objectives, the park has been subdivided into units called Landscape Management Units. Relatively low levels of use are planned in three of six landscape units (<100 people/groups per month). High volume commercial operations are inconsistent with this low use objective, and are therefore not encouraged in these areas of the park. The park encourages opportunities for third party interpretation in the Kicking Horse landscape unit. The Yoho/Emerald landscape unit is being managed as 'the park's major destination area known for its premier hiking and skiing opportunities'. These landscape units presently have high visitor use and access. High levels of summer use can result in crowded conditions at the trailheads and viewpoints. However, there are exceptional opportunities for viewing natural and cultural features.

Some general information

- Environmental Assessments are required as part of the application for each new outdoor activity business.
- Backcountry groups are currently limited to 10 persons including the guide.
- No new commercial facilities are allowed in the backcountry.

- Helicopters may not transport visitors, their equipment or supplies to backcountry destinations.
- All of the activities in this study require that operators have a National Park business license.

This Chart presents the general situation in Yoho National Park with respect to the studied tourism opportunities.

Activity	Opportunity	Use Criterion *	Environmental Assessment
Snowmobiling	no	**not** permitted in the park	N/A
Ski Touring	yes	limits will apply	required
Cross Country Skiing	yes, limited number of track set trails	limits will apply	required
Mountaineering	yes	limits will apply	required
Rock Climbing	classic alpine rock routes for experienced or guided climbing parties	limits will apply	required
Canoeing/Kayaking	No commercial opportunity	limits currently apply	N/A
Fishing	limited opportunity, the level of guided fishing is restricted as per section 5.6.3.3.8 of the park management plan	limits will apply,	required
Mountain Biking	No commercial opportunity, cycling restricted to individual use on easy trails	limits currently apply	N/A
Hiking	yes - extensive trail system	limits will apply	required
Natural and Cultural Features Viewing	yes - system of viewing opportunities	limits may apply	presently not required

Use Criterion *
It is essential that heritage tourism businesses remain sustainable. Overuse damages the resources Parks Canada has been charged to protect and reduces visitor and client

satisfaction. **Use Criterion and limits** on certain business activities are therefore appropriate. Examples of requirements/ limits include but are not limited to: bivouac permit, wilderness pass, group size limits, trails used, facilities used, number of trips, frequency of trips and timing of trips.

B.C. Tourism Opportunity Study - Mount Revelstoke and Glacier National Parks

Tourism operators in Mount Revelstoke and Glacier National Parks are expected to respect the integrity of the natural environment and provide visitors with an immersion in the natural and cultural heritage of the park. Operators need to support the 'Heritage Tourism' approach which means that they will raise awareness about the park; promote sustainable tourism by encouraging environmental stewardship; deliver products and services that are appropriate and consistent with heritage and environmental protection; and finally, they will train employees' so they can share an understanding of the Parks' natural and cultural heritage with visitors.

Parks Canada is supportive of appropriate businesses in Mount Revelstoke and Glacier National Parks. However, the business opportunities in this study are subject to certain limits and conditions.

Readers who wish to provide services in Mount Revelstoke and Glacier National Parks are urged to first contact the **Park Administrative Officer at 250-837-7537** regarding the latest on business license requirements. The 'Business License Application for an Outdoor Activities Business License' provides specific information on the process and limitations that apply. The Park Management Plan for Mount Revelstoke and Glacier National Parks is a second essential source of information. It will help you develop a business that is relevant and appropriate to Mount Revelstoke and Glacier National Parks. The plan can be ordered by calling Mount Revelstoke and Glacier National Parks at: 1-250-837-7500. Park brochures are another source which provide basic information about the parks.

Nine of the ten activities in this 'Tourism Opportunity Study' are allowed in Mount Revelstoke and Glacier National Parks. The park applies 'Appropriate Use Criterion' to determine the type and amount of an activity allowed. In order to achieve ecological and visitor experience objectives, the park has been subdivided into units called Landscape Management Units. Relatively low levels of use are planned in three of the parks' five landscape units, with less than 100 visitor/groups per month. High volume commercial operations are inconsistent with this low use objective, and are therefore not encouraged in these areas of the park.

Opportunities for third party interpretation are available in the Meadows in the Sky Parkway and
Trans-Canada Highway Corridor units. The Meadows in the Sky Parkway is managed as Mount Revelstoke National Park's major destination area, known for its premier hiking and walking opportunities. The Highway Corridor includes all of Glacier National Park's principal frontcountry destinations, including the Illecillewaet Campground and trail complex. The Meadows in the Sky Parkway and the Trans-Canada Highway Corridor presently have high visitor use and many access points. High levels of summer and autumn use can result in crowded conditions at the trailheads, picnic areas and viewpoints. However, there are exceptional opportunities for viewing natural and cultural features.

Some general information

- Environmental Assessments are required as part of the application for each new outdoor activity business.
- Backcountry groups are currently limited to 10 persons including the guide.
- No new commercial facilities are allowed in the backcountry.
- Helicopters may not transport visitors, their equipment or supplies to backcountry destinations.
- All of the activities in this study require that operators have a National Park business license.
- Motorized or mechanized access to the backcountry is not permitted.

This Chart presents the general situation in Mount Revelstoke and Glacier National Parks with respect to the studied tourism opportunities.

Activity	Opportunity	Use Criterion *	Environmental Assessment
Snowmobiling	no	**not** permitted in the park	N/A
Ski Touring	yes	limits currently apply	required
Cross Country Skiing	yes, one track set trail	limits not expected to apply	required
Mountaineering	yes	limits may apply in future	required
Rock Climbing	classic alpine rock routes for experienced or guided climbing parties	limits may apply in future	required
Canoeing/Kayaking	very limited opportunity, best opportunities outside of park boundaries	limits may apply in future	required
Fishing	very limited opportunity, lake fishery only, ban on all stream fishing to protect bull trout	limits currently apply	required
Mountain Biking	no commercial opportunity, cycling restricted to individual use on three trails only	limits currently apply	N/A
Hiking	yes - extensive trail system	limits may apply in future	required

Natural and Cultural Features Viewing	yes - system of viewing opportunities	limits may apply in future	presently not required

Use Criterion *

It is essential that heritage tourism businesses remain sustainable. Overuse damages the resources Parks Canada has been charged to protect and reduces visitor and client satisfaction. Use Criterion and limits on certain business activities are therefore appropriate. Examples of requirements/limits include but are not limited to: wilderness pass, ski-touring closure areas, group size limits, trails used, facilities used, number of trips, frequency of trips, timing of trips and wildlife management closures.

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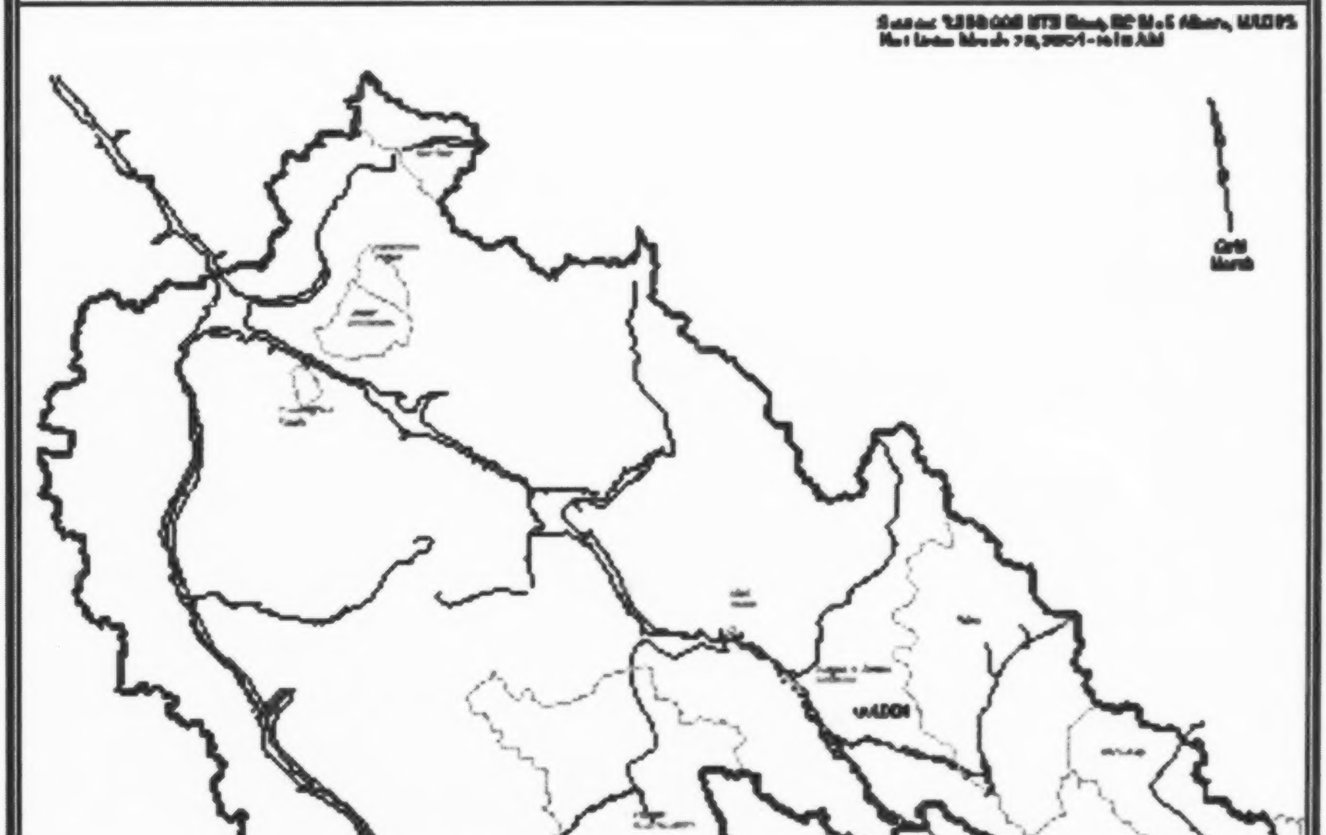
High Opportunity Areas
Rockclimbing

Tourism Opportunity Strategy for Columbia Valley Forest District


Grid North
1
2
3
4
REVELSTOKE
Legend
1 Laurette Slabs
2 Begbie Bluffs
3 [illegible]
4 Blanket Creek
High Opportunity Areas

High Opportunity Areas
Ski Touring

Tourism Opportunity Strategy for Columbia Valley Forest District

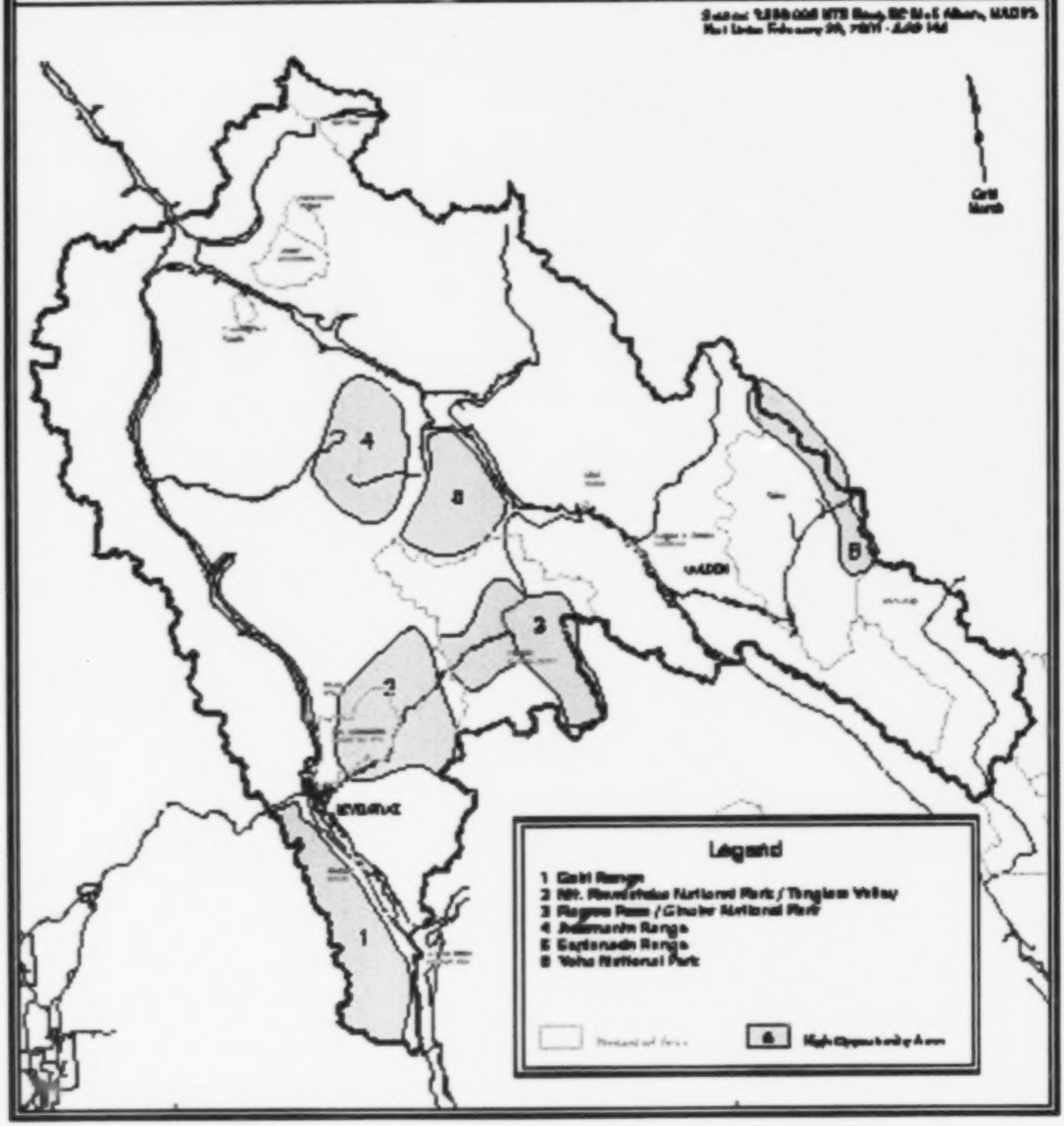
Kilometres

[illegible]

-20 0 20 40 60

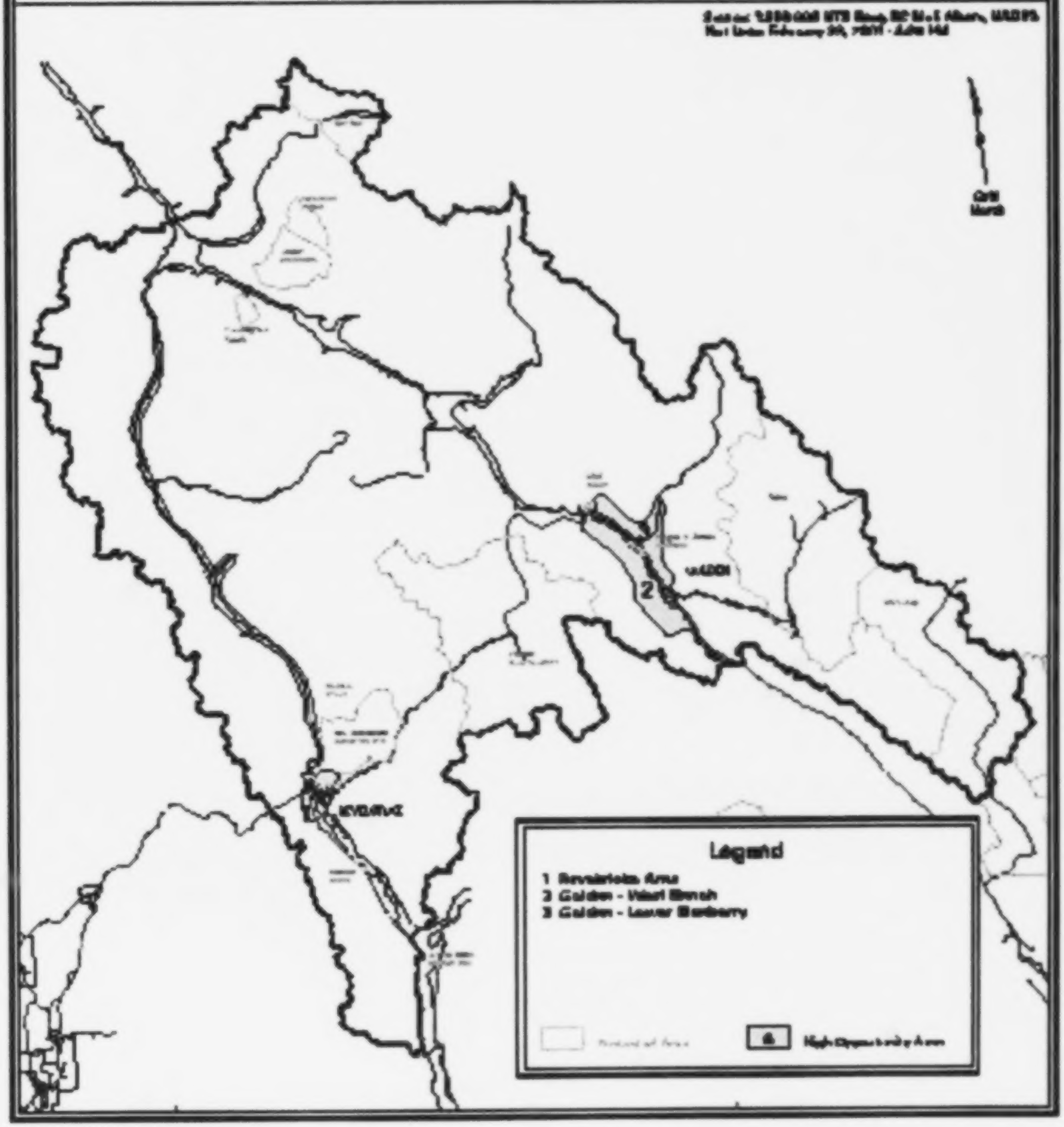
[illegible]

[illegible]


Grid North
1
2
3
4
5
6
REVELSTOKE
GOLDEN
Legend
1 Gold Range
2 Mt. Revelstoke National Park / Tangiers Valley
3 Rogers Pass / Glacier National Park
4 Adamant Range
5 Esplanade Range
6 Yoho National Park
Protected Areas
6
High Opportunity Areas

High Opportunity Areas Cross-Country Skiing

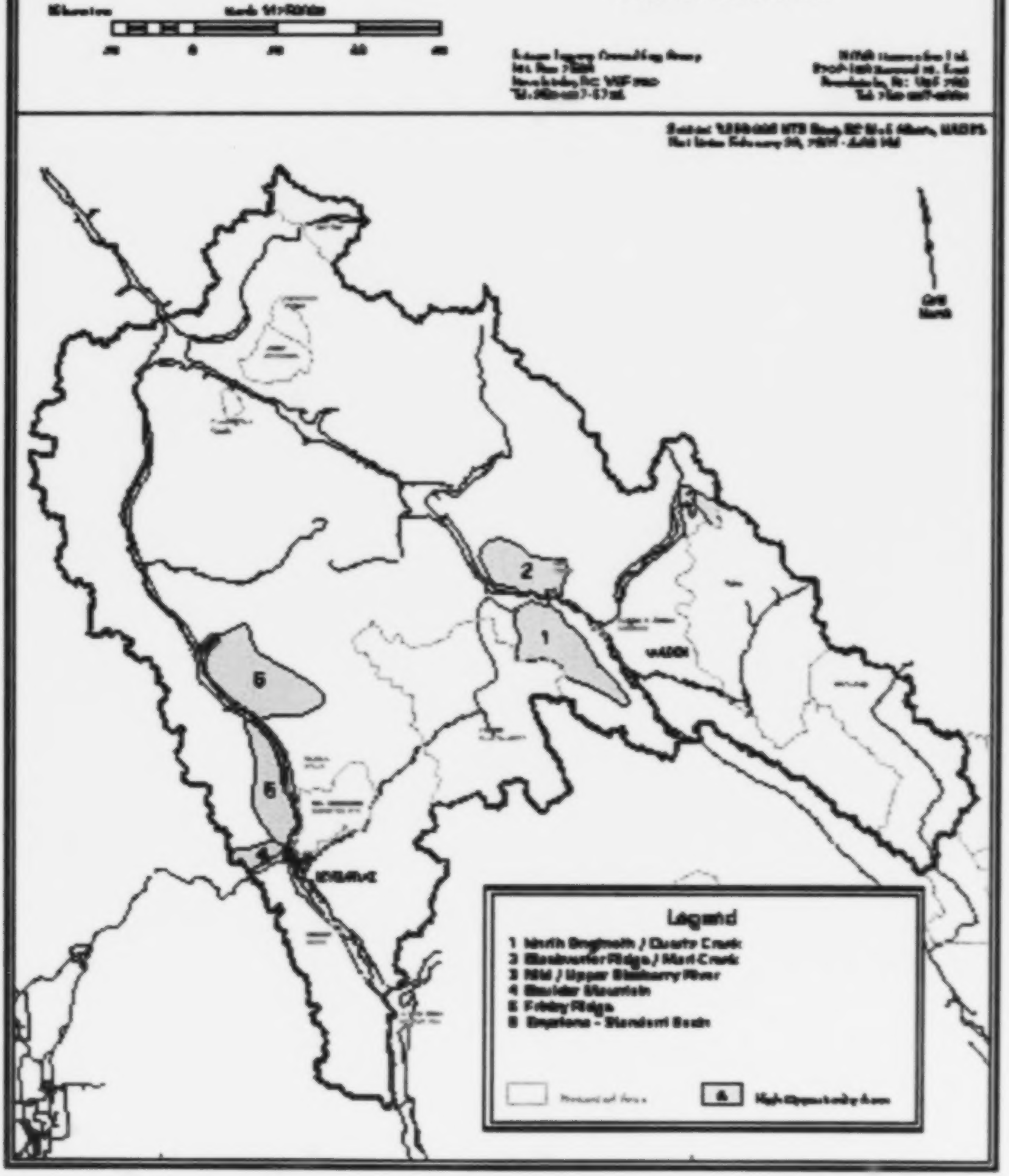
Tourism Opportunity Strategy for Columbia Valley Forest District



GOLDEN
REVELSTOKE
2
Legend
1 Revelstoke Area
2 Golden - West Bench
3 Golden - Lower Blaeberry
High Opportunity Area

High Opportunity Areas
Snowmobiling

Tourism Opportunity Strategy for Columbia Valley Forest District

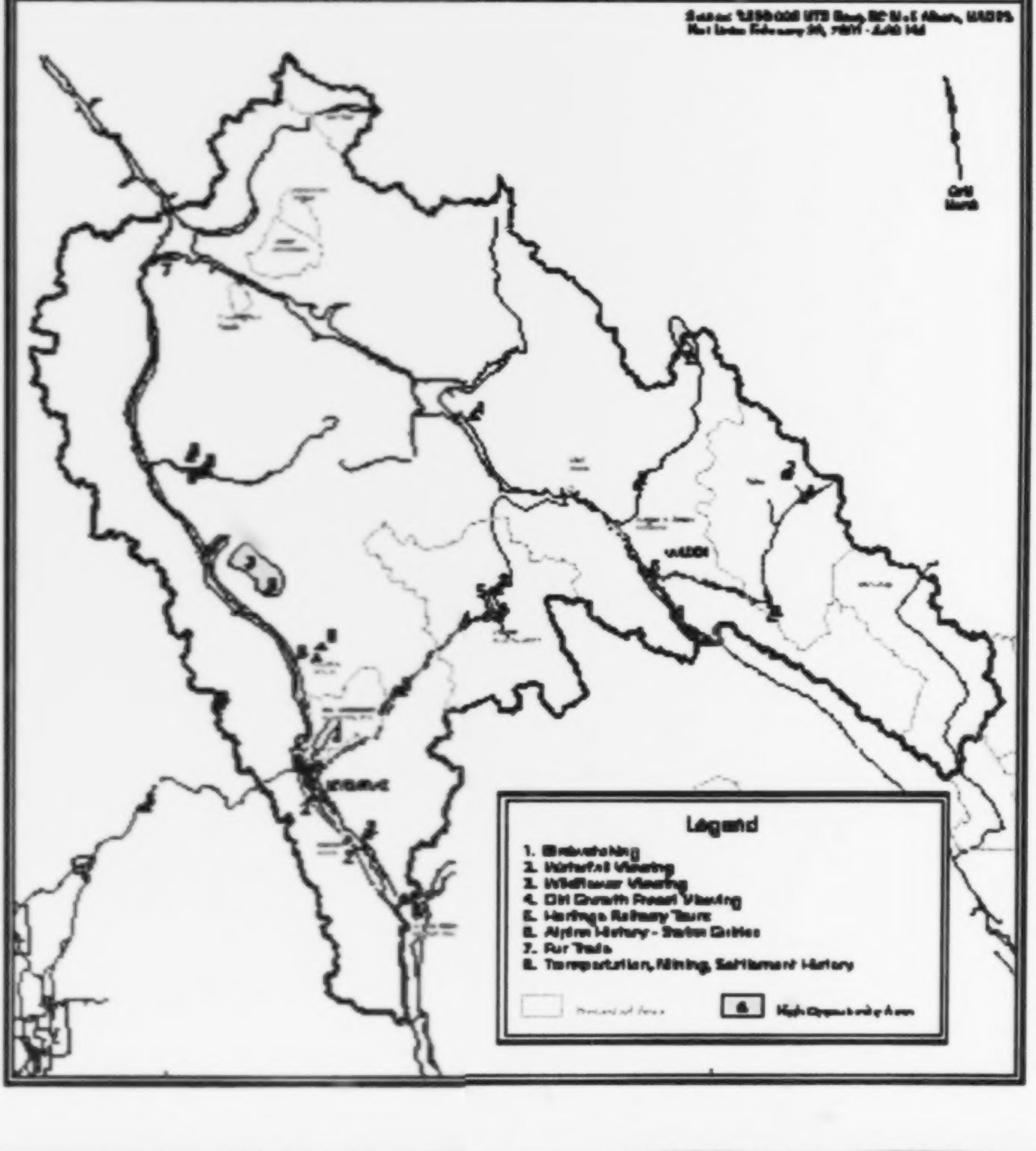

Kilometres
0
North
REVELSTOKE
GOLDEN
1
2
5
5
6
4
Legend
1 North [illegible] / Quartz Creek
2 [illegible] Ridge / [illegible] Creek
3 [illegible] / Upper Blaeberry River
4 Boulder Mountain
5 Frisby Ridge
6 Keystone - Standard Basin
High Opportunity Area

High Opportunity Areas
Natural and Cultural
Features Viewing

Tourism Opportunity Strategy
for Columbia Valley
Forest District

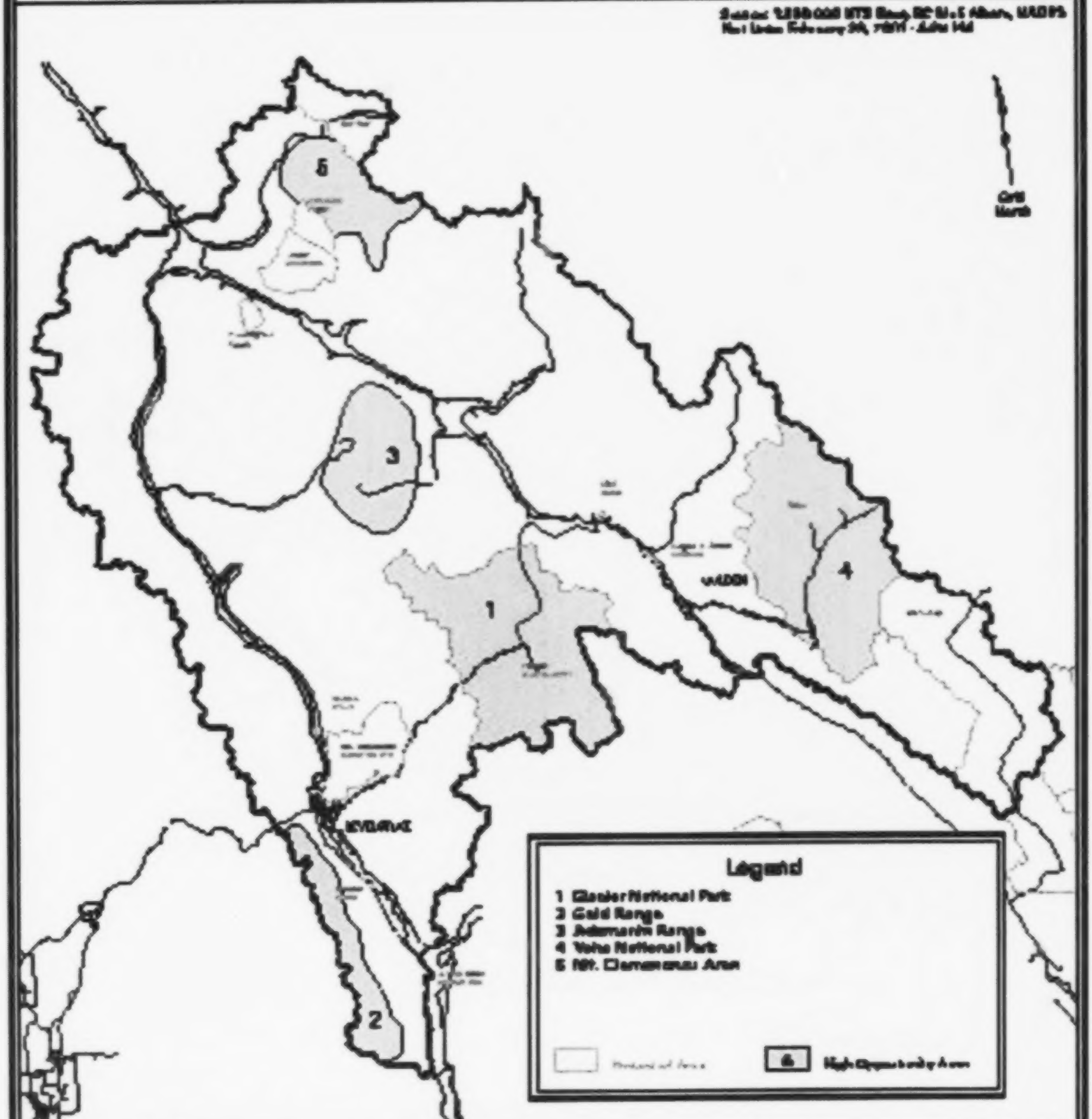
[illegible]

[illegible]


Legend
1. Birdwatching
2. Waterfall Viewing
3. Wildflower Viewing
4. Old Growth Forest Viewing
5. Heritage Railway Tours
6. Alpine History - Swiss Guides
7. Fur Trade
8. Transportation, Mining, Settlement History
Protected Areas
6
High Opportunity Area

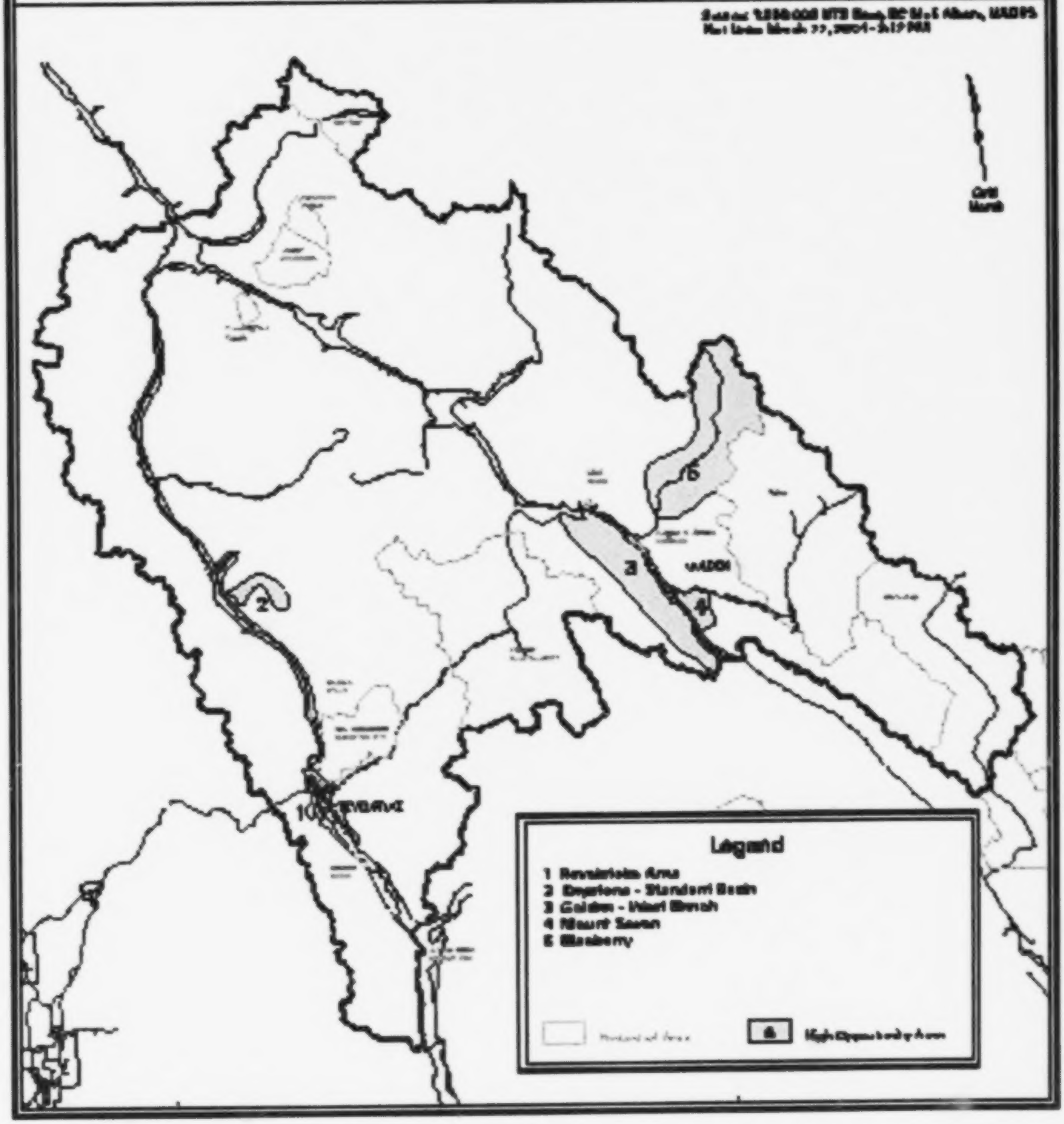
High Opportunity Areas
Mountaineering

Tourism Opportunity Strategy for Columbia Valley Forest District


5
3
1
4
2
REVELSTOKE
GOLDEN
Legend
1 Glacier National Park
2 Gold Range
3 Adamant Range
4 Yoho National Park
5 Mt. Clemenceau Area
High Opportunity Areas

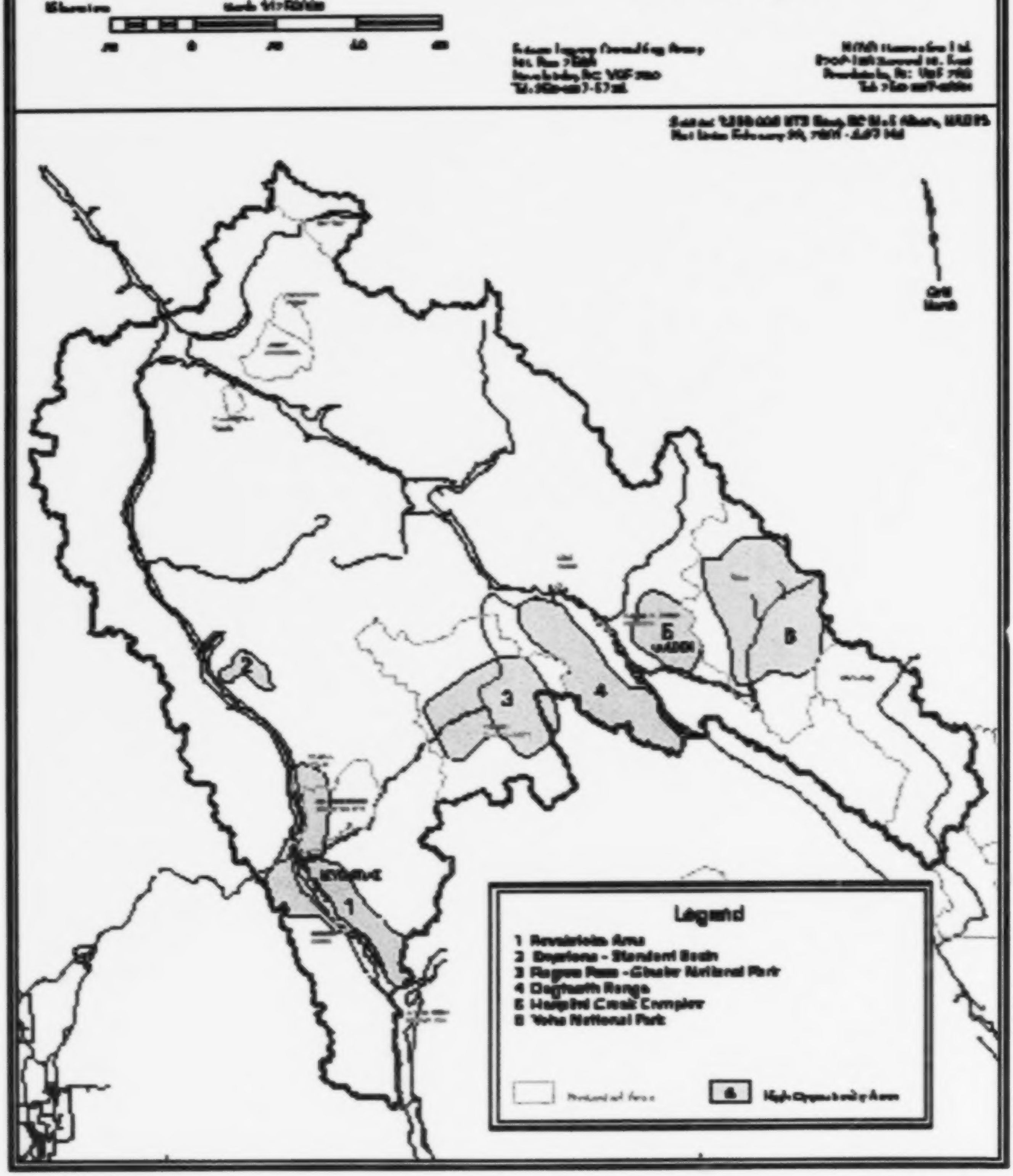
High Opportunity Areas
Mountain Biking

Tourism Opportunity Strategy for Columbia Valley Forest District


REVELSTOKE
GOLDEN
1
2
3
4
5
Grid North
Legend
1 Revelstoke Area
2 Keystone - Standard Basin
3 Golden - [illegible] Bench
4 Mount Seven
5 Blaeberry
6 High Opportunity Areas

High Opportunity Areas
Hiking

Tourism Opportunity Strategy for Columbia Valley Forest District


Legend
1 Revelstoke Area
2 [illegible] - Standard Basin
3 Rogers Pass - Glacier National Park
4 Dogtooth Range
5 Hospital Creek Complex
6 Yoho National Park
Protected Areas
6
High Opportunity Areas
1
2
3
4
5
6

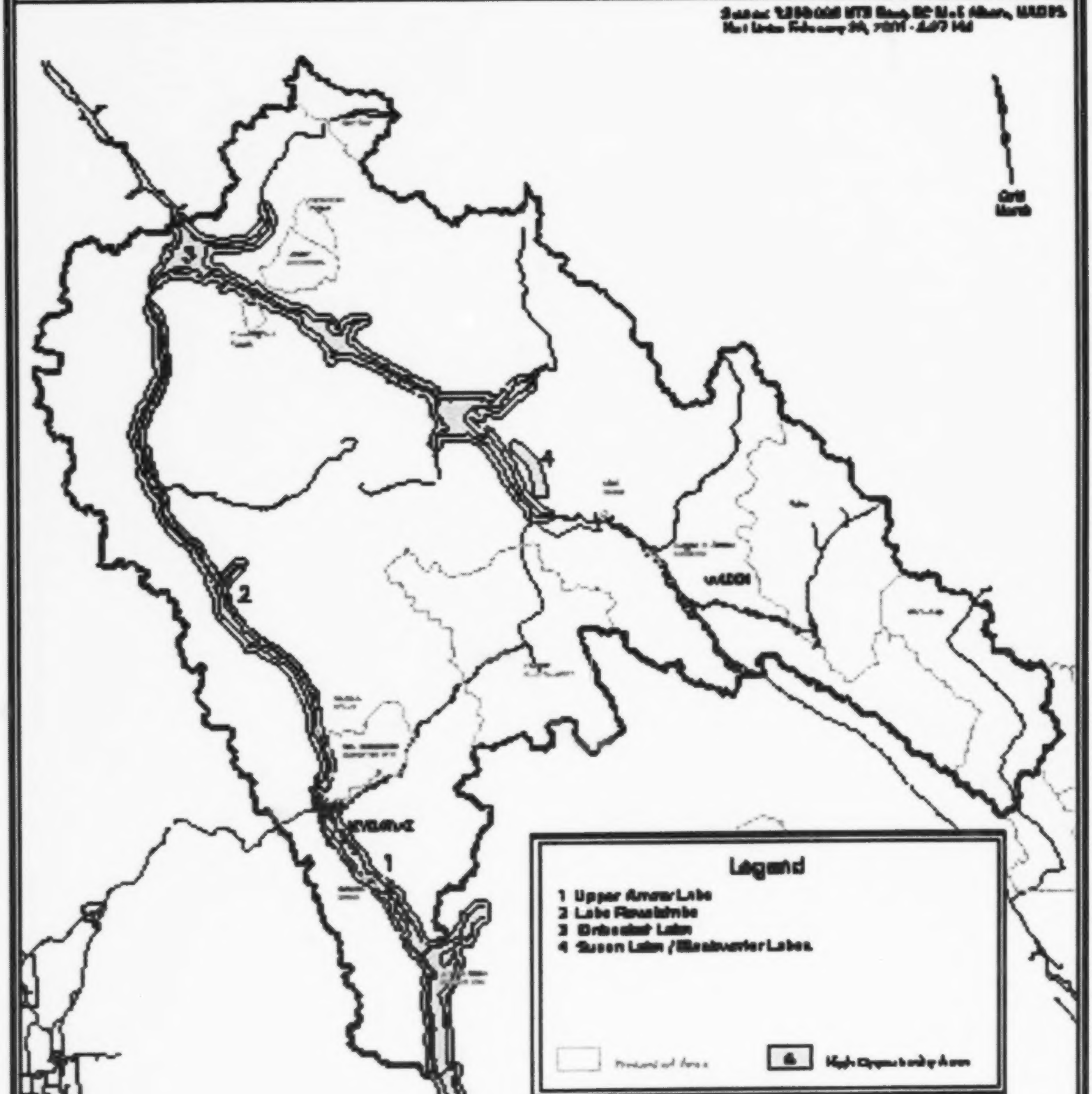
High Opportunity Areas
Fishing

Tourism Opportunity Strategy for Columbia Valley Forest District

Kilometres [illegible]

[illegible]

[illegible]



REVELSTOKE
GOLDEN
1
2
3
4
Grid North

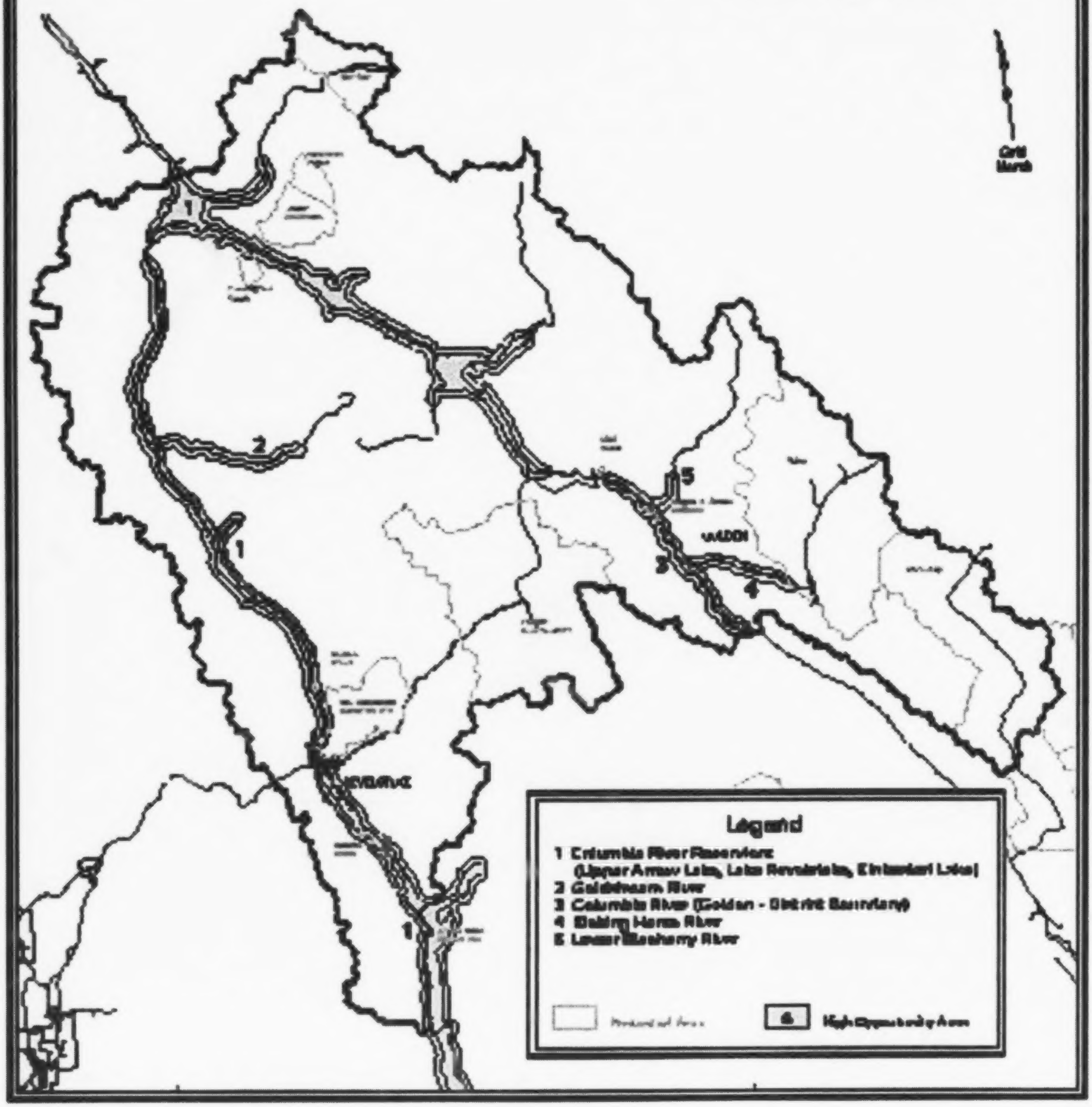
Legend

1 Upper Arrow Lake
2 Lake Revelstoke
3 Kinbasket Lake
4 Susan Lake / Blackwater Lakes

High Opportunity Areas

High Opportunity Areas
Canoeing / Kayaking

Tourism Opportunity Strategy for Columbia Valley Forest District


1
2
1
5
3
4
1
Golden
Revelstoke
Grid North
Legend
1 Columbia River Reservoirs (Upper Arrow Lake, Lake Revelstoke, Kinbasket Lake)
2 Goldstream River
3 Columbia River (Golden - District Boundary)
4 Kicking Horse River
5 Lower Blaeberry River
Protected Areas
6
High Opportunity Areas